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TAPIT Import

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http://www.trisys.com
(As of 03/03/05)
Version 1.1.0

For newest information and updates go to http://www.trisys.com

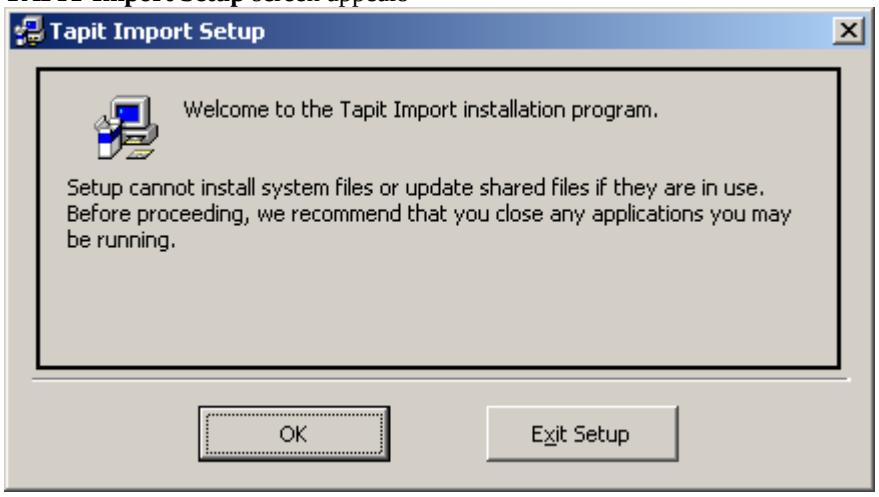
SYSTEM REQUIREMENTS

- Pentium™ II Based PC
- 128 MB RAM
- Microsoft™ Windows 98/NT/2000/XP Professional
- 250 MB free disk space
- Read/Write access to the TAPIT database
- Read/Write access to the to-be-imported CSV file.

INSTALLATION

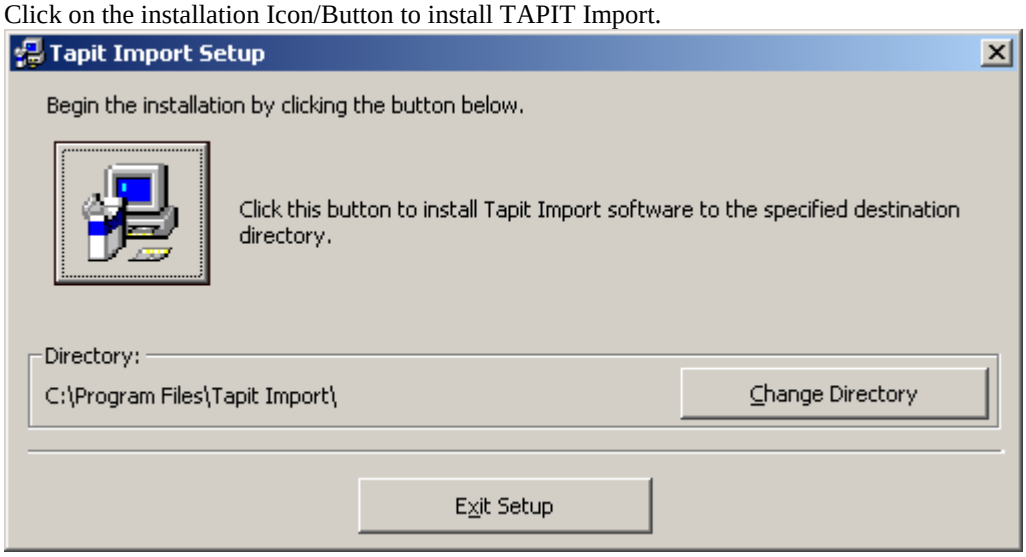
Installing TAPIT Import

1. To start TAPIT Import installation program, double click on Setup.EXE.
2. **TAPIT Import Setup** screen appears

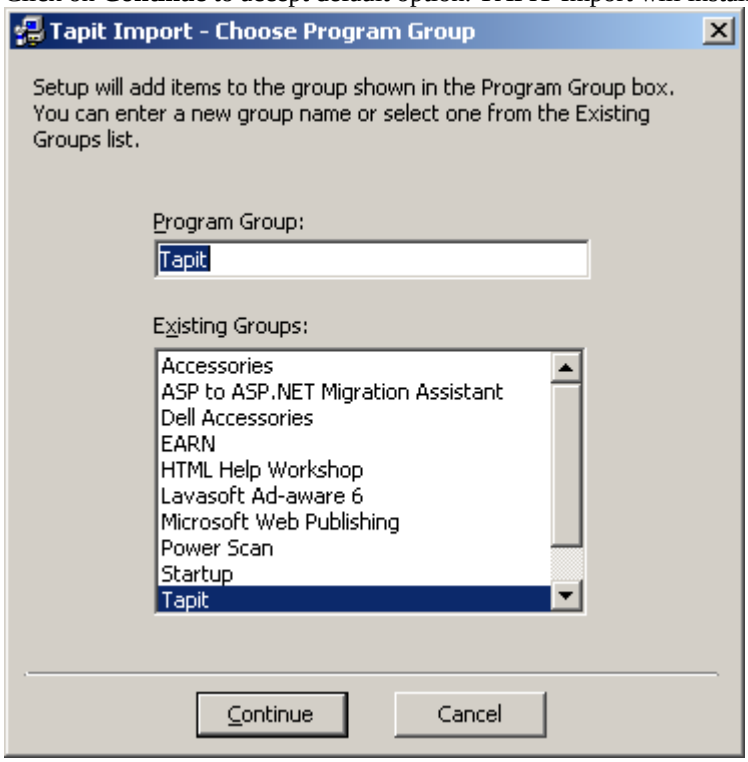


3. Click on **OK**.

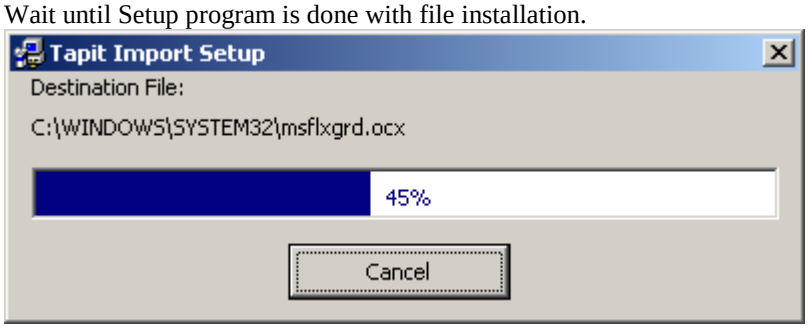
4. Click on the installation Icon/Button to install TAPIT Import.



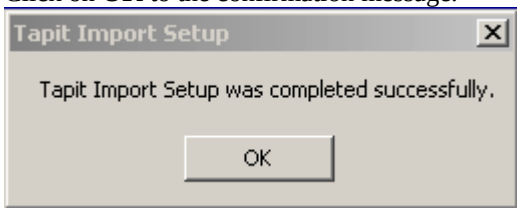
5. The **Choose Program Group** screen is displayed.
Click on **Continue** to accept default option. TAPIT Import will install in TAPIT program group.



6. Wait until Setup program is done with file installation.



7. Click on **OK** to the confirmation message.



You can start using TAPIT Import.

CIENT IMPORT

Glossary of Terms

TEXT field – the field in CSV file that needs to be imported to TAPIT.

TAPIT field – the field in TAPIT Database. TEXT field is imported to TAPIT filed.

TEXT record – a record (a line) in CSV file. This record is imported to TAPIT Database to either Client or User table.

TAPIT record – a record in TAPIT Database. A record from CSV file (TEXT record) is imported to either Client or User table in TAPIT Database. Once in TAPIT Database, it becomes TAPIT record.

Before Importing Data

- TAPIT Import Wizard accepts files in a CSV (comma delimited) format.
  Use export facilities provided by the application you are importing from to create a CSV file.
- Before export, validate your data using guidelines below.

Validating Data

TAPIT Import matches TEXT records with TAPIT records – one to one
One TEXT record (one line in the CSV file) corresponds to one TAPIT record.
Each Client/User has only one record in the CSV file. That record may contain, in Client case, **multiple phone numbers.**

Sample Client record from CSV file:

"Hanover Florist","215 Ridgedale Ave","Florham Park","NJ","(973) 360-2300","973-360-2222","99358"

Each comma-delimited value is a **TEXT field** i.e. Hanover Florist is one of the TEXT fields.
You would match the above fields to be imported the following way:

TEXT field	TAPIT field
Hanover Florist	Client Company Name
215 Ridgedale Ave	Client Business Address 1
Florham Park	Client City
NJ	Client State
(973) 360-2300	Client Phone Number
973-360-2222	Client Phone Number
99355	Client Account Code

TAPIT Client fields available for Import:

TAPIT Client Id field is not available for import from the CSV file.
Instead TAPIT assigns a new Client Id to each imported record.

Each Client TAPIT field can be associated with only one TEXT field except Client Phone Number. Client records can have more than one phone numbers, thus Client Phone Number can be matched with multiple TEXT fields, provided the phone numbers are within Client TEXT records (are listed on the same line in CSV text file).

Client First Name

Client Last Name and Client Company Name

If you import Last Name and Company Name:

Last Name will be combined with **First Name** and put into **Client First Name** in TAPIT.

Company Name will be put into **Last Name/Company** in TAPIT. **Company Name** cannot be empty in CSV file or the TEXT record is rejected (not imported to TAPIT). Company Name has to contain the name to represent Clients on the TAPIT reports.

If you import only Last Name (no Company Name):

Last Name will be put into **Last Name/Company** in TAPIT. **Last Name** cannot be empty in CSV file or the TEXT record will be rejected (not imported to TAPIT). Last Name has to contain the name to represent Clients on the TAPIT reports.

If you import only Company Name (no Last Name):

Company Name will be put into **Last Name/Company** in TAPIT. **Company Name** cannot be empty in CSV file or the TEXT record will be rejected (not imported to TAPIT). **Company Name** has to contain the name to represent Clients on the TAPIT reports.

Client Business Address 1

Client Business Address 2

Client City

Client State

Client Zip Code

Client Phone Number

Client can have multiple phone numbers – multiple TEXT fields can be associated with the TAPIT Client Phone Number filed. All phone numbers have to be listed within the same TEXT record as shown below.

For Example:

Sample Client record from CSV file

"Hanover Florist","215 Ridgedale Ave","Florham Park","NJ","(973) 360-2300","973-360-2222","99358"

Each comma-delimited value is a TEXT field.
You would match the above fields for Import the following way:

TEXT field	TAPIT field
Hanover Florist	Client Company Name
215 Ridgedale Ave	Client Business Address 1
Florham Park	Client City
NJ	Client State
(973) 360-2300	**Client Phone Number**
973-360-2222	**Client Phone Number**
99358	Client Account Code

Phone Number can contain digits, parenthesis ( ), dashes – and spaces. No other characters are accepted. If other characters are found the entire Client record associated with this Phone Number is rejected.
973-360-2300 – valid format.

(973) 360-2300 – valid format.

973.360.2300 – invalid format.

1-800-Pick UPS – invalid format.

973.360.2300 ext 103 – invalid format.

Phone Number cannot be less than 10 digits and more than 24 digits.

Phone Number cannot be duplicated in the TAPIT Database. If Phone Number already exists in the TAPIT Database, the entire Client record associated with this Phone Number is rejected.

For example:

There is a client in TAPIT with the Phone Number "(973) 360-2300".
The attempt to import record:

"Hanover Florist","215 Ridgedale Ave","Florham Park","NJ","(973) 360-2300","973-360-2222","99358"

is unsuccessful because it would duplicate the phone number – "(973) 360-2300".

If a Phone Number is duplicated within CSV file the record with the first instance of this Phone Number is saved in TAPIT Database. All subsequent records containing the same Phone Number are rejected**.**

For example:

First record:
"Hanover Florist","440 Ridgedale Ave","Florham Park","NJ","**(973) 360-2300**","973-360-2133","02358" – this record is saved

Second record:
"Trisys, Inc.","215 Ridgedale Ave","Florham Park","NJ","**(973) 360-2300**","973-360-2222","99358" this record is rejected because it would duplicate the phone number – "(973) 360-2300".

Client Account Code

Client can have only one Account Code.

Account Code field accepts digits and letters. No other characters are accepted. If characters, other than digits and letters, are found the entire Client record associated with this Account Code is rejected.

99358– valid format.

UPSCOM – valid format.

99**#8 – invalid format.

Account Code cannot be more than 16 digits/letters.

Account Code cannot be duplicated in TAPIT. If an Account Code exists in TAPIT Database already the entire record associated with this Account Code is rejected.

For example:

There is a client in TAPIT with the Account Code "99358".
In this case the attempt to import record: "Hanover Florist","215 Ridgedale Ave","Florham Park","NJ","(973) 360-2300","973-360-2222","99358" will be unsuccessful because it would duplicate the Account Code –" 99358".

If an Account Code is duplicated within the CSV file the first record read is saved in TAPIT Database. All subsequent records, containing the same Account Code, are rejected.

For example:
Two records have the same Account Code – 99358.

The record for Hanover Florist is read first.

“Hanover Florist”,”440 Ridgedale Ave”,”Florham Park”,”NJ”,”(973) 360-2111”,”973-360-2133”,” **99358**”

The Hanover Florist record is saved.

The record for Trisys, Inc. is read second.

“Trisys, Inc.”,”215 Ridgedale Ave”,”Florham Park”,”NJ”,”(973) 360-2300”,”973-360-2222”,”**99358**”

At this time TAPIT Database already contains Account Code 99358 associated with the Hanover Florist Client. Thus, Trisys, Inc. record is rejected because it would duplicate the Account Code –“ 99358”.

Examples of Client CSV file (displayed in Excel)
How to import Client Last Name and Client Company Name properly

TAPIT field **Client Last Name/Company** holds a name identifying Client on the TAPIT reports. Either **Client Last Name** or **Client Company Name** is stored in this field. The following scenarios explain how the CSV file format impacts import to the **Client Last Name/Company** field.

CASE 1

The Client CSV file contains Last Name but NO Company Name.
Client Last Name identifies Clients on the TAPIT reports.

Microsoft Excel - Client.CSV

File Edit View Insert Format Tools Data Window Help

Arial 10 B

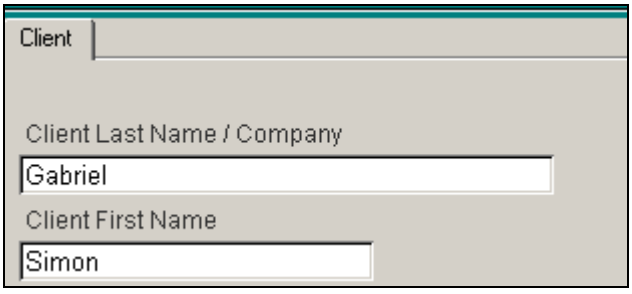
L27 =

	A	B	D	E	F	G	H	I	J	K
1	First Name	Last Name	Account C	Street	City	State	Zip	Phone 1	Phone 2	
2	Samuel	Jones	13456	1386 Syca	Marion	OH	43567	419 825 3257		
3	Simon	Gabriel	12345	235 Hellna	Bayonne	NJ	7925	201 898 1386		
4	Kathy	Clark	58925			NJ	79815	908 835 5687	908 2515548	
5	Henry	Goldstain	89651	1464 Ham	Jersey City	NJ	71978	(973) 458-7245	1(973) 565-4565	
6	Nancy	Davey	50983	235 Shelto	Thornton	CO		(303) 429-5812	1(303) 480-5499	
7	Teresa	Litak		135 Sill Dr	Hally	MD	97235	(548) 448-5489	1(484) 548-4564	
8	Anna	Chua		1464 Ham	Jersey City	NJ	7978	(201) 458-7245	(973) 565-4565	
9	Agnes	Litak		215 Ridge	Florham P	NJ	7932	(973) 360-2222	(973) 360-2300	
10										

The **Last Name** column holds only Client last names. The **Company** column does not exist.
In this scenario **Last Name** column must have an entry for each Client. If the **Last Name** text filed is empty the Client TEXT record is not going to be imported to TAPIT.

When imported to TAPIT, contents of the **First Name** TEXT field are saved in the **Client First Name** TAPIT field. **Last Name** goes into the **Client Last Name/Company** field.

The following screen shows how **First Name** and **Last Name** TEXT fields (line 3 the CSV file above) are saved in TAPIT.



CASE 2

The Client CSV file contains Client Last Name and Client Company Name for each Client.
Client Company Name identifies Clients on the TAPIT reports.

Microsoft Excel - Client.CSV

File Edit View Insert Format Tools Data Window Help

Arial 10

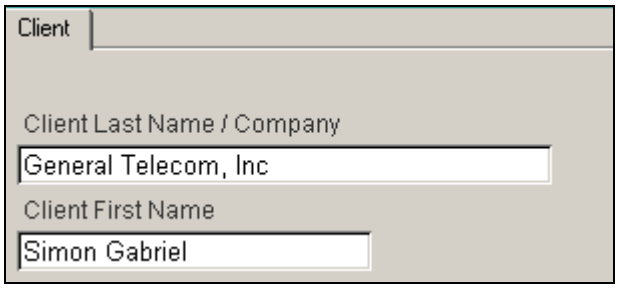
E11 =

	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Company	Account C	Street	City	State	Zip	Phone 1
2	Samuel	Jones	Plastic & Wood, Inc	13456	1386 Syca	Marion	OH	43567	419 825 3
3	Simon	Gabriel	General Telecom, In	12345	235 Hellna	Bayonne	NJ	7925	201 898 1
4	Kathy	Clark	Comaid	58925			NJ	79815	908 835 5
5	Henry	Goldstain	Tristate Co.	89651	1464 Ham	Jersey City	NJ	71978	(973) 458
6	Nancy	Davey	1 Nation Technology	50983	235 Shelto	Thornton	CO		(303) 429
7	Teresa	Litak	Trisys Telecom, Inc		135 Sill Dr	Hally	MD	97235	(548) 448
8	Anna	Chua	Tristate Co.		1464 Ham	Jersey City	NJ	7978	(201) 458
9	Agnes	Litak	Trisys Telecom		215 Ridge	Florham P	NJ	7932	(973) 360
10									

The **Last Name** column holds only Client last names. The **Company** column holds only Client company names.
In this scenario **Company** column must have an entry for each Client. If the **Company** TEXT filed is empty the TEXT record is not going to be imported to TAPIT.

When imported to TAPIT, **First Name** TEXT field is combined with **Last Name** TEXT field and is saved into the **Client First Name** TAPIT field. **Company Name** goes into the **Client Last Name/Company** field.

The following screen shows how **First Name**, **Last Name** and **Company** TEXT fields (line 3 the CSV file above) are saved in TAPIT.



CASE 3

The Client CSV file contains Client Last Name for some Clients and Client Company Name for others.

Clients are represented on the TAPIT reports by **Company Name** in some cases and by **Last Name** in other.

Microsoft Excel - ClientLastComp.CSV

File Edit View Insert Format Tools Data Window Help

J26

	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Company	Account C	Street	City	State	Zip	Phone 1
2	Samuel	Jones	Jones	13456	1386 Syca	Marion	OH	43567	419 825 3
3	Simon		Gabriel	12345	235 Hellna	Bayonne	NJ	7925	201 898 1
4	Kathy	Clark	Comaid	58925			NJ	79815	908 835 5
5	Henry	Goldstain	Tristate Co.	89651	1464 Ham	Jersey City	NJ	71978	(973) 458-
6	Nancy	Davey	1 Nation Technology	50983	235 Shelto	Thornton	CO		(303) 429-
7	Teresa	Litak	Trisys Telecom, Inc		135 Sill Dr	Hally	MD	97235	(548) 448-
8	Anna	Chua	Tristate Co.		1464 Ham	Jersey City	NJ	7978	(201) 458-
9	Agnes		Litak		215 Ridge	Florham P	NJ	7932	(973) 360-

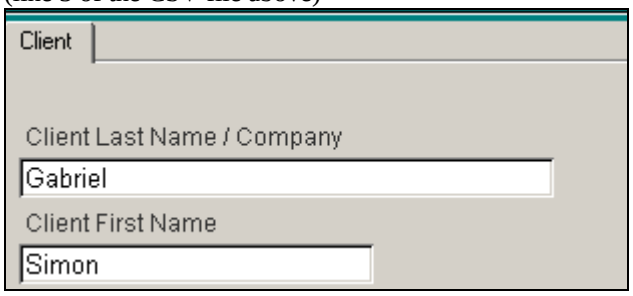
The **Last Name** column holds only Client last names. The **Company** column holds both Client company names and last names (in case Client does not have a company name). This column has to hold the client identifier – the name you want to use to represent Client on the TAPIT reports.

In this scenario **Company** column must have an entry for each Client. If the **Company** TEXT filed is empty the TEXT record is not going to be imported to TAPIT.

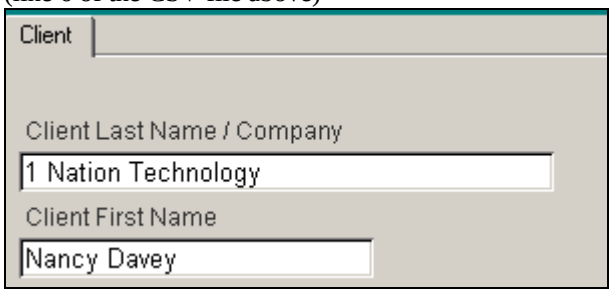
When imported to TAPIT, the **First Name** TEXT filed is combined with the **Last Name** TEXT field and goes into the **Client First Name** TAPIT field. **Company** column goes into **TAPIT Client Last Name/Company**.

The following screens show how **First Name**, **Last Name** and **Company** text fields are saved in TAPIT.

(line 3 of the CSV file above)

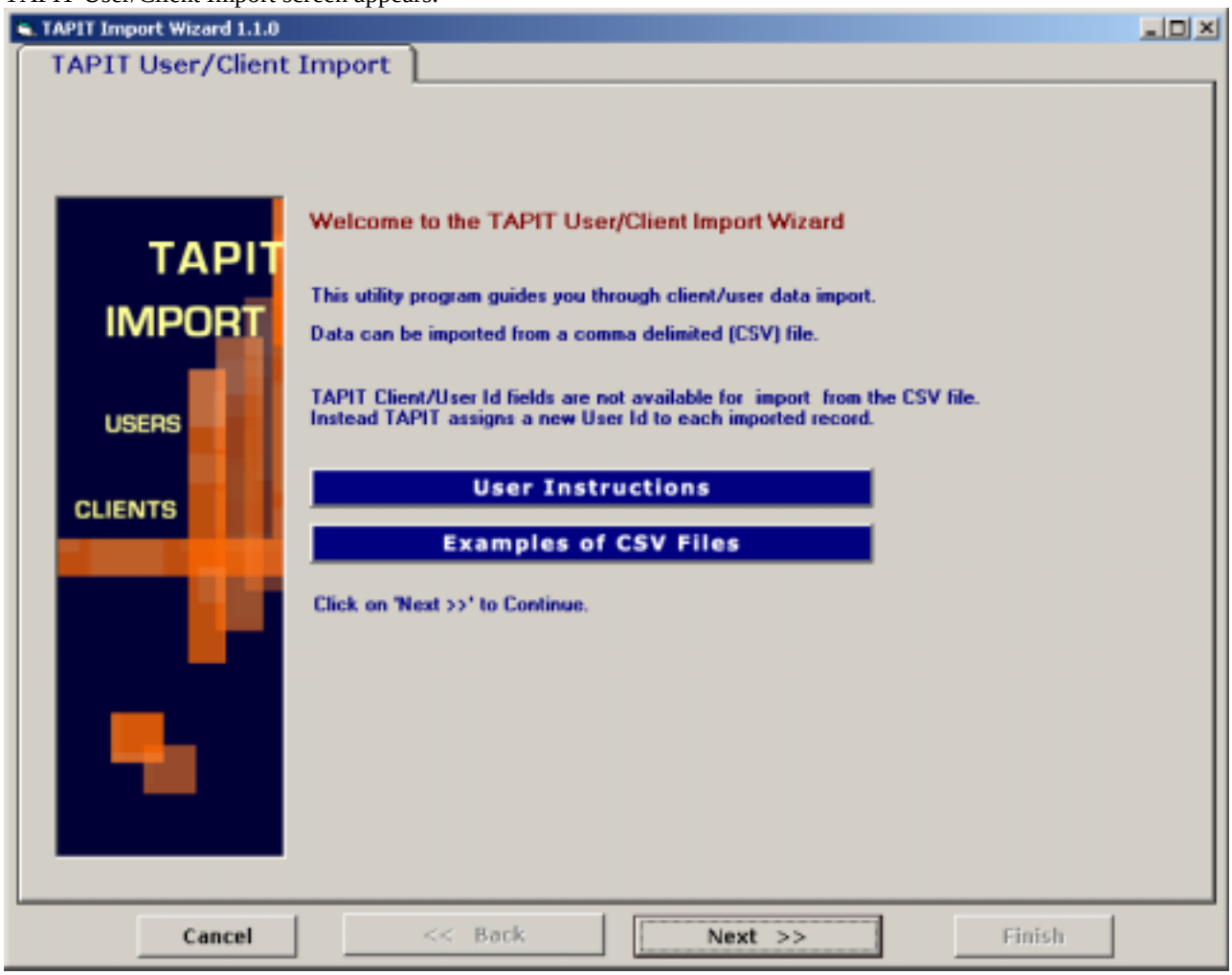


(line 6 of the CSV file above)



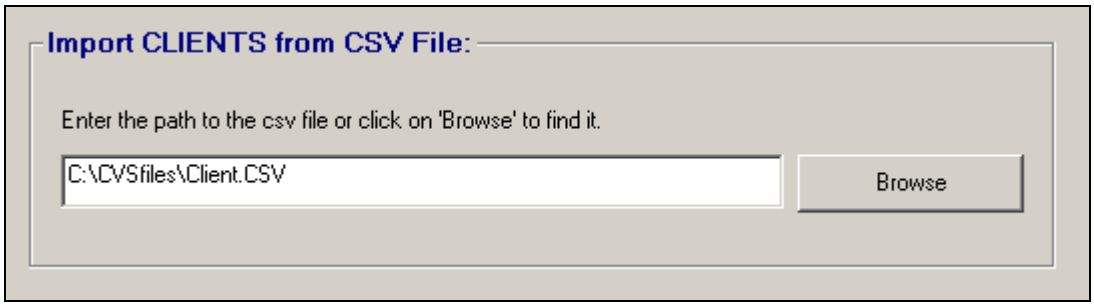
Using Import Wizard

1. Start Import Wizard by clicking on **START/TAPIT/TAPIT Import**.
   TAPIT User/Client Import screen appears.



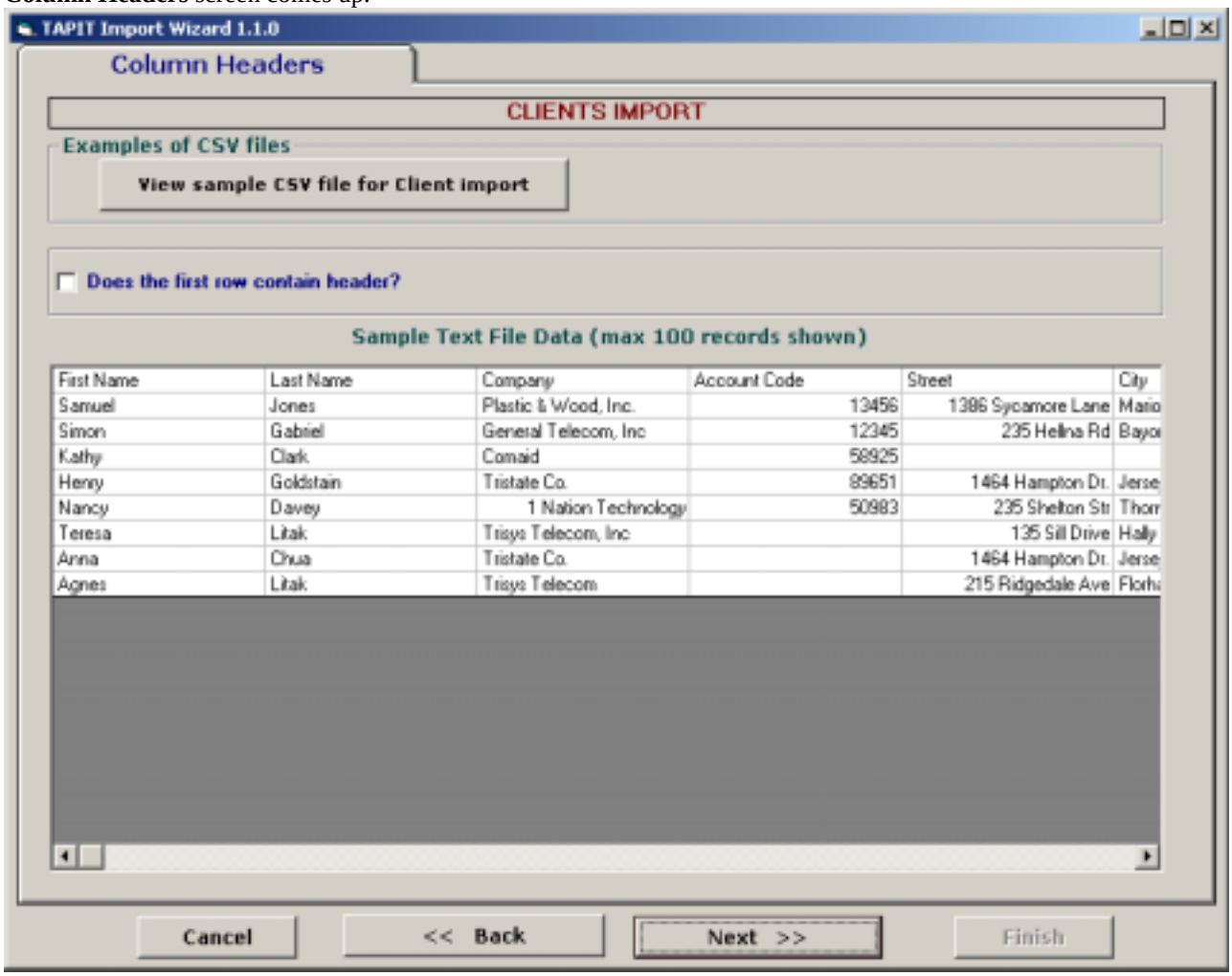
2. Click on **Next**.
   Select **Destination Table** screen displays.

   Click on **Clients** option to check it.
3. Click on **Next**.
   Locate Files screen opens.
   Enter the Path to the CSV file, or click on the **Browse** button to find it.

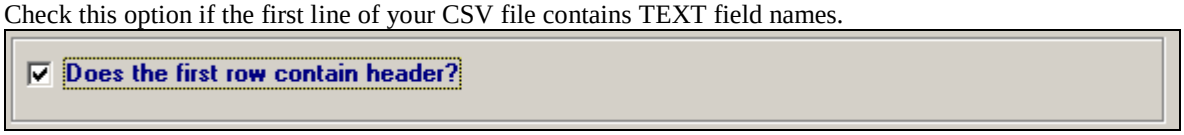


Enter the Path to the TAPIT Database, or click on the **Browse** button to find it.

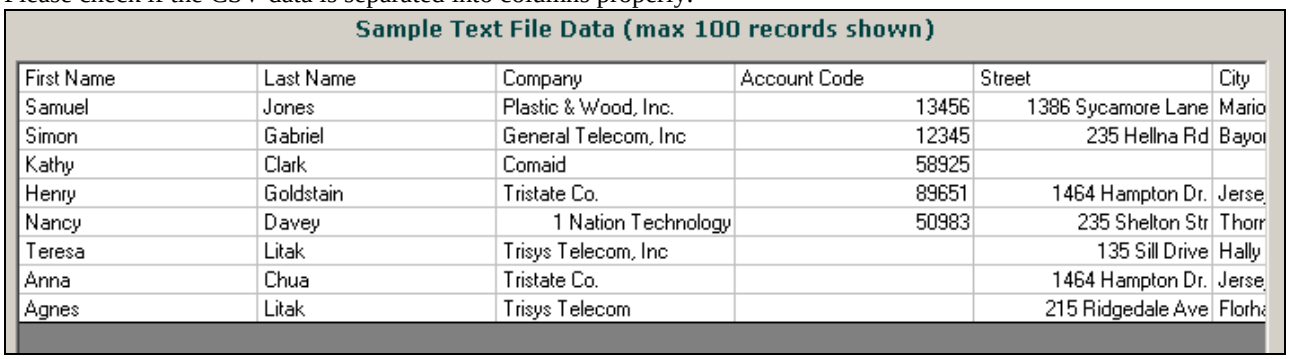
4. Click on **Next**
Column Headers screen comes up.



Does the first row contain headers?
Check this option if the first line of your CSV file contains TEXT field names.



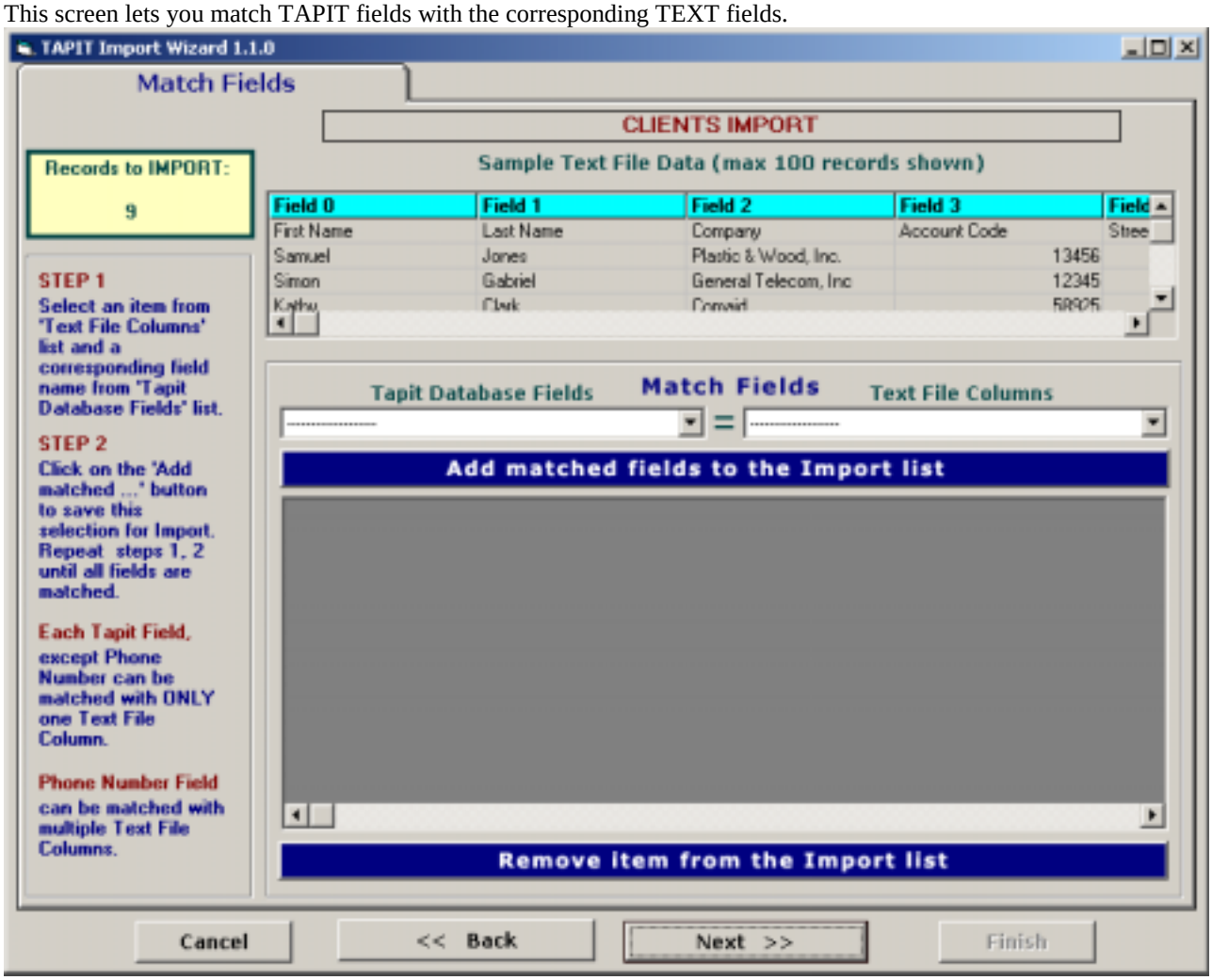
5. The **Sample Text File Date** is displayed on your screen. Only the first 100 lines of your CSV file are displayed. Please check if the CSV data is separated into columns properly.



Sample Text File Data (max 100 records shown)

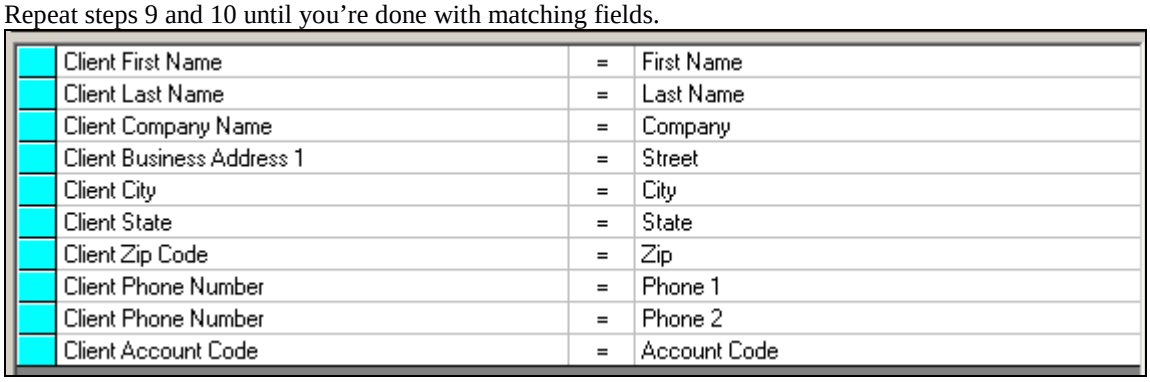
First Name	Last Name	Company	Account Code	Street	City
Samuel	Jones	Plastic & Wood, Inc.	13456	1386 Sycamore Lane	Mario
Simon	Gabriel	General Telecom, Inc	12345	235 Hellna Rd	Bayor
Kathy	Clark	Comaid	58925		
Henry	Goldstain	Tristate Co.	89651	1464 Hampton Dr.	Jerse
Nancy	Davey	1 Nation Technology	50983	235 Shelton Str	Thorr
Teresa	Litak	Trisys Telecom, Inc		135 Sill Drive	Hally
Anna	Chua	Tristate Co.		1464 Hampton Dr.	Jerse
Agnes	Litak	Trisys Telecom		215 Ridgedale Ave	Florh

6. Click on **Next**.
   The **Match Fields** screen appears.
   This screen lets you match TAPIT fields with the corresponding TEXT fields.



7. **Sample Text File Data** on the top of the screen, displays up to 100 records of the CSV TEXT file data. The top row consists of the names of the TEXT file columns. These names are listed in the **Text File Columns** list box. Sample Data is provided as a reference in field matching. You can check what data each column contains.
8. Select a TAPIT field from **TAPIT Database Fields** list box and then a corresponding item from **Text File Columns**.

9. Click on **Add matched fields to the Import List**.
   The matched fields appear on the **Import List**.
   Repeat steps 9 and 10 until you're done with matching fields.



	Client First Name	=	First Name
	Client Last Name	=	Last Name
	Client Company Name	=	Company
	Client Business Address 1	=	Street
	Client City	=	City
	Client State	=	State
	Client Zip Code	=	Zip
	Client Phone Number	=	Phone 1
	Client Phone Number	=	Phone 2
	Client Account Code	=	Account Code

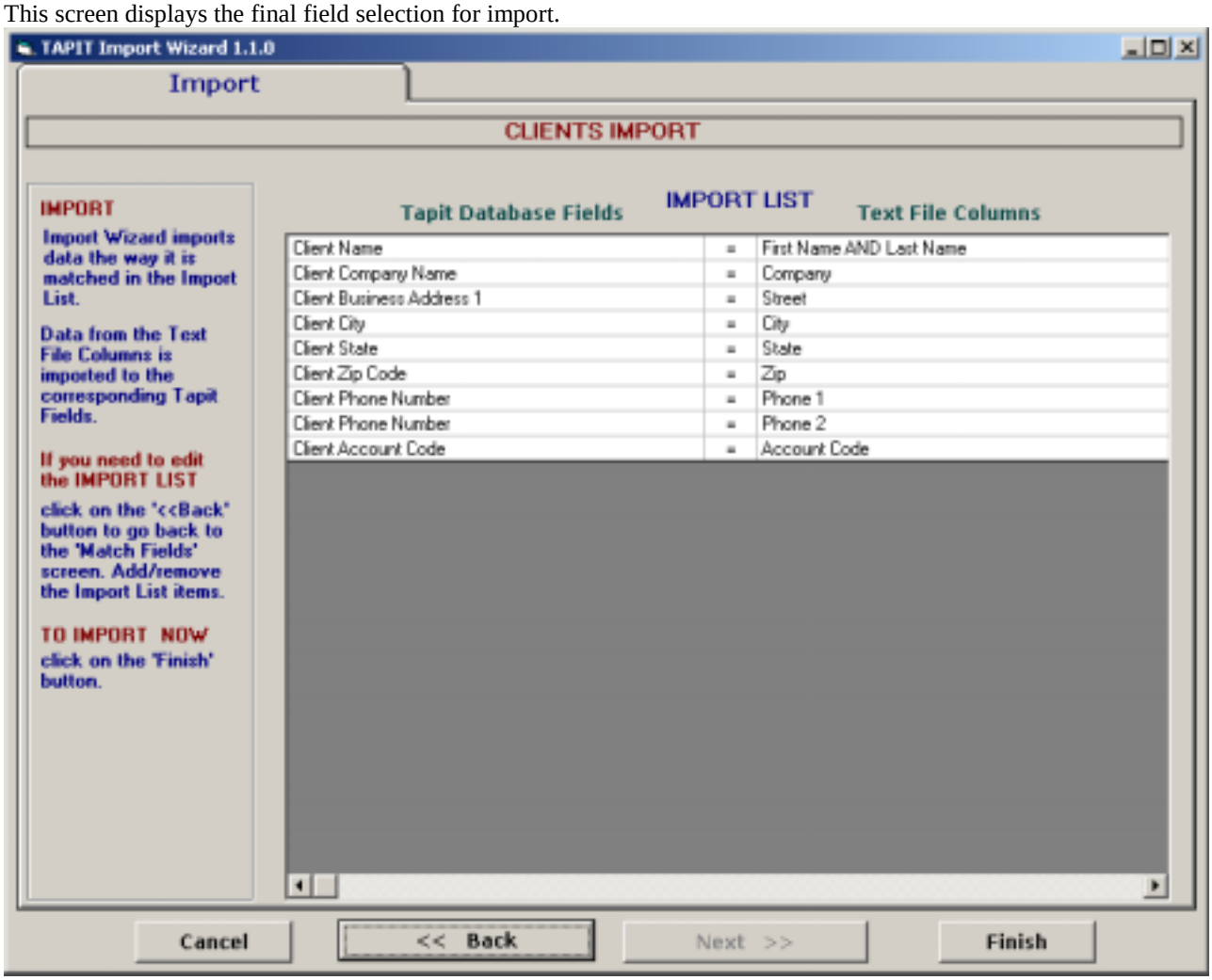
WHEN MATCHING CLIENT FIELDS

Either **Client Last Name** or **Client Company Name** has to be imported.
If **Client Company Name** is included in import – this field cannot be empty.
If **Client Company Name** is not included, then **Client Last Name** has to be included and it cannot be empty.

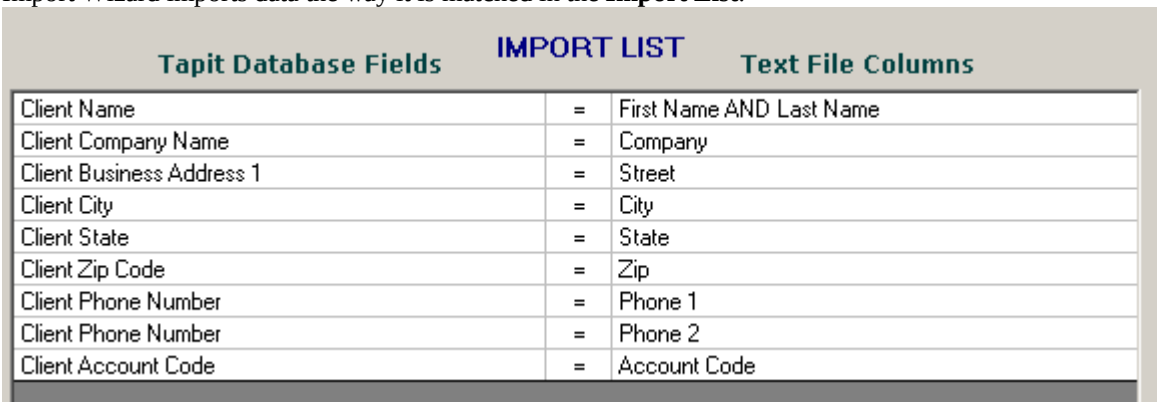
TAPIT **Client Phone Number** is the only field that can be matched with multiple TEXT fields (columns). Client can have multiple phone numbers.

All other TAPIT fields can be matched each with only one TEXT field (column).

10. When all fields are matched, click on **Next**.
    The **Import Screen** appears.
    This screen displays the final field selection for import.



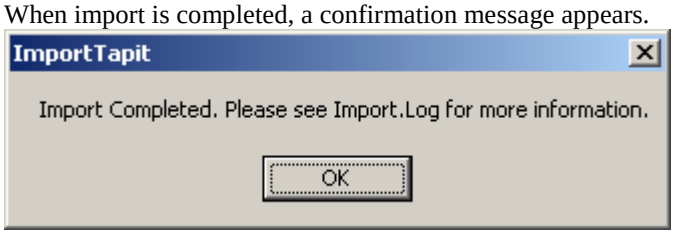
11. Import Wizard imports data the way it is matched in the **Import List**.



If you need to edit the **Import List**, click on the **Back** button to go back to the **Match Fields** screen. **Add** or **Remove** rows from the **Import List**.

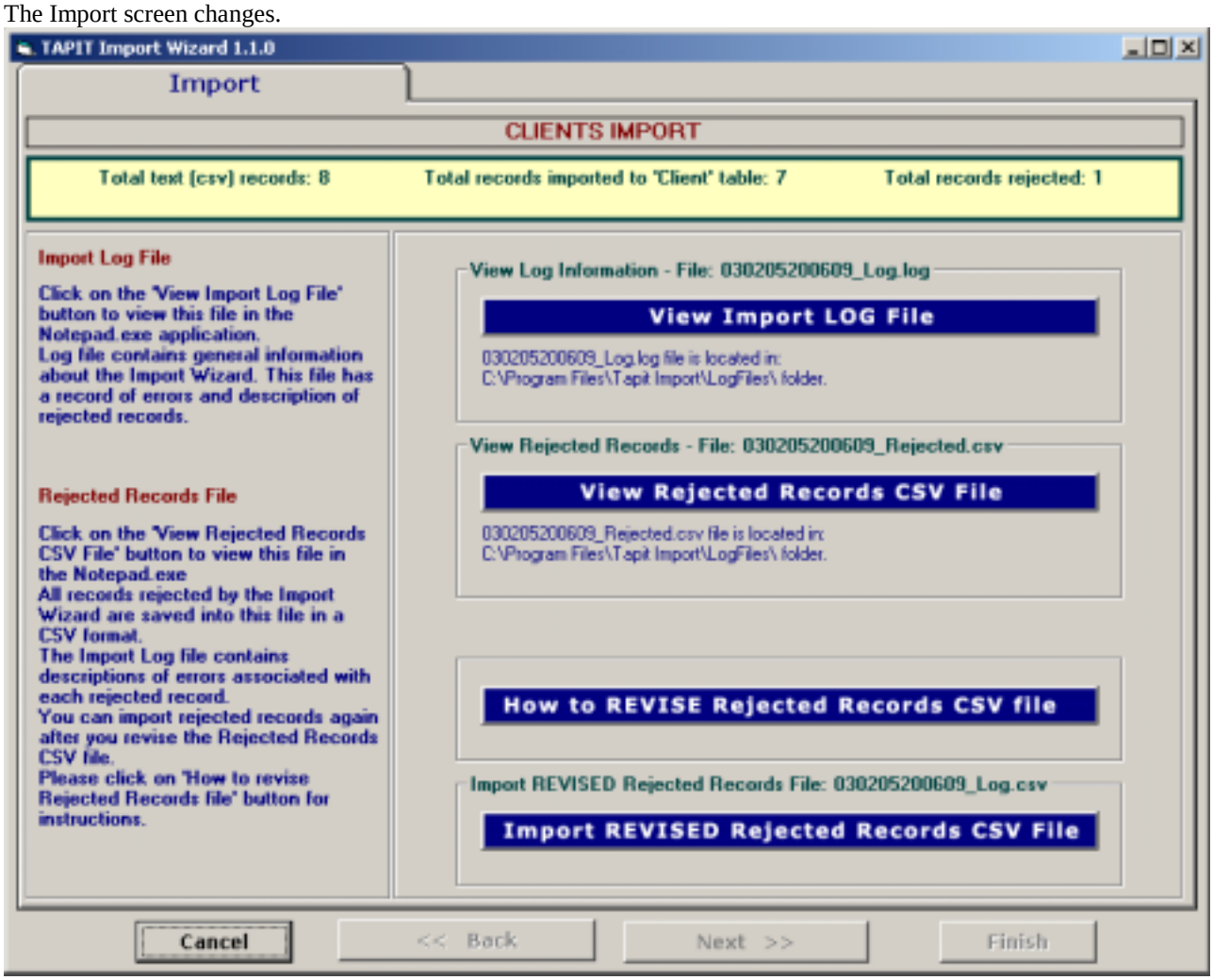
Otherwise, click on **Finish** to import.

12. When import is completed, a confirmation message appears.



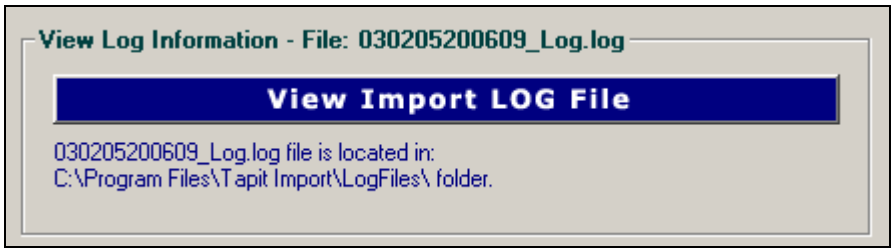
Click on **OK**.

13. The Import screen changes.



Top of the Import screen displays Import statistics.
Following example below – the CSV file contained 8 total TEXT records, 7 TEXT records were successfully saved (imported) into the TAPIT Database. 1 TEXT record was rejected (was not imported).

14. To find out more about rejected records click on the **View Import Log File** button.



The log file contains information about import.

==========CLIENTS IMPORT==========

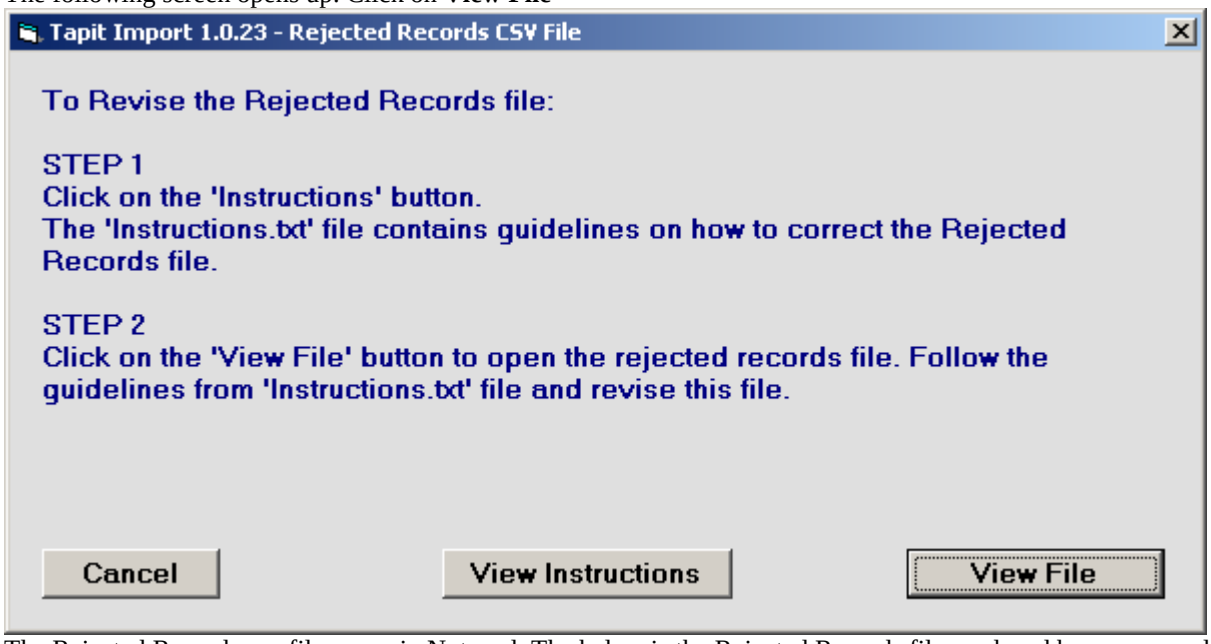
Import FROM CSV file C:\CVSfiles\Client.CSV
Import TO the C:\TAPITW32\TAPITdb.mdb database, Client table
**********03/02/05 20:31**********
****
FIELDS ARE MATCHED THE FOLLOWING WAY:
Client Name = First Name AND Last Name (Field0 & ' ' & Field1 ClientFirstName)
Client Company Name = Company (Field2 ClientLastName)
Client Business Address 1 = Street (Field4 ClientBAddress1)
Client City = City (Field5 ClientBCity)
Client State = State (Field6 ClientBState)
Client Zip Code = Zip (Field7 ClientBZip)
Client Phone Number = Phone 1 (Field8 CPNPhoneNumber)
Client Phone Number = Phone 2 (Field9 CPNPhoneNumber)
Client Account Code = Account Code (Field3 ClientAccountCode)
****

(why records were rejected
rec # matches the record number in a rejected file csv)

Rejected rec # 1Phone Number: "9735654565" already exists in a database and has not been saved in TAPIT
**********03/02/05 20:32**********
(Import statistics)
Import to the Client table from file C:\CVSfiles\Client.CSV is completed
8 total CSV file records.
7 imported records.
1 rejected records.
****

15. To view rejected records click on the **View Rejected Records CSV File** button

16. The following screen opens up. Click on **View File**



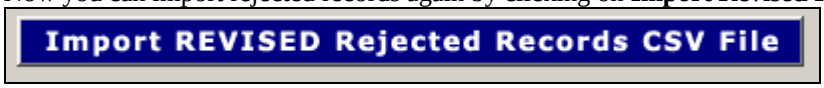
The Rejected Records csv file opens in Notepad. The below is the Rejected Records file produced by our example import (how it is displayed in Notepad).
The entries marked bold in this manual are the entries to be corrected – the log file above has a list of these entries and information on what needs to be corrected.
The first row of our rejected file is the headers. The Rejected Records file headers reflect headers used originally in our CSV import file. The headers must be left unchanged.

"Rec Number","Company","First Name AND Last Name","Street","City","State","Zip","Account Code","Phone 1","Phone 2" ***(end of headers)***
"1","Tristate Co.","Anna Chua","1464 Hampton Dr.","Jersey City","NJ","7978","","(201) 458-7245",**"(973) 565-4565"** ***(end of line 1)***

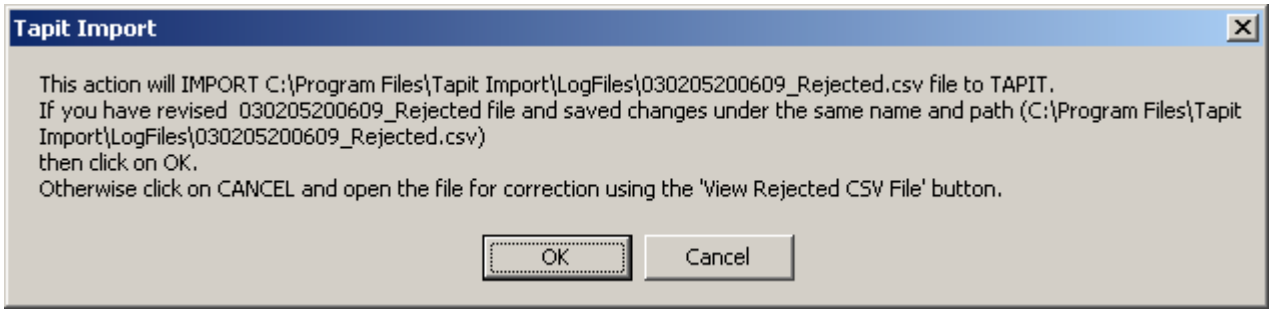
The same Rejected Records file after corrections:
"Rec Number","Company","First Name AND Last Name","Street","City","State","Zip","Account Code","Phone 1","Phone 2"***(end of headers – did not change anything here)***
"1","Tristate Co.","Anna Chua","1464 Hampton Dr.","Jersey City","NJ","7978","","(201) 458-7245",**"(973) 230-4489"** ***(end of line 1 - revised)***

The Rejected Records file needs to be saved in Notepad under the same name.

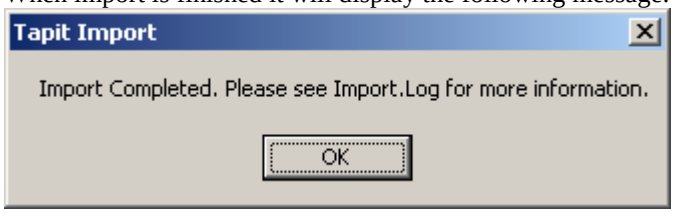
17. Now you can import rejected records again by clicking on **Import Revised Rejected Records CSV File**.



18. If you have corrected the Rejected Records file and saved it under the same name (overwritten) then click on **OK** to continue.

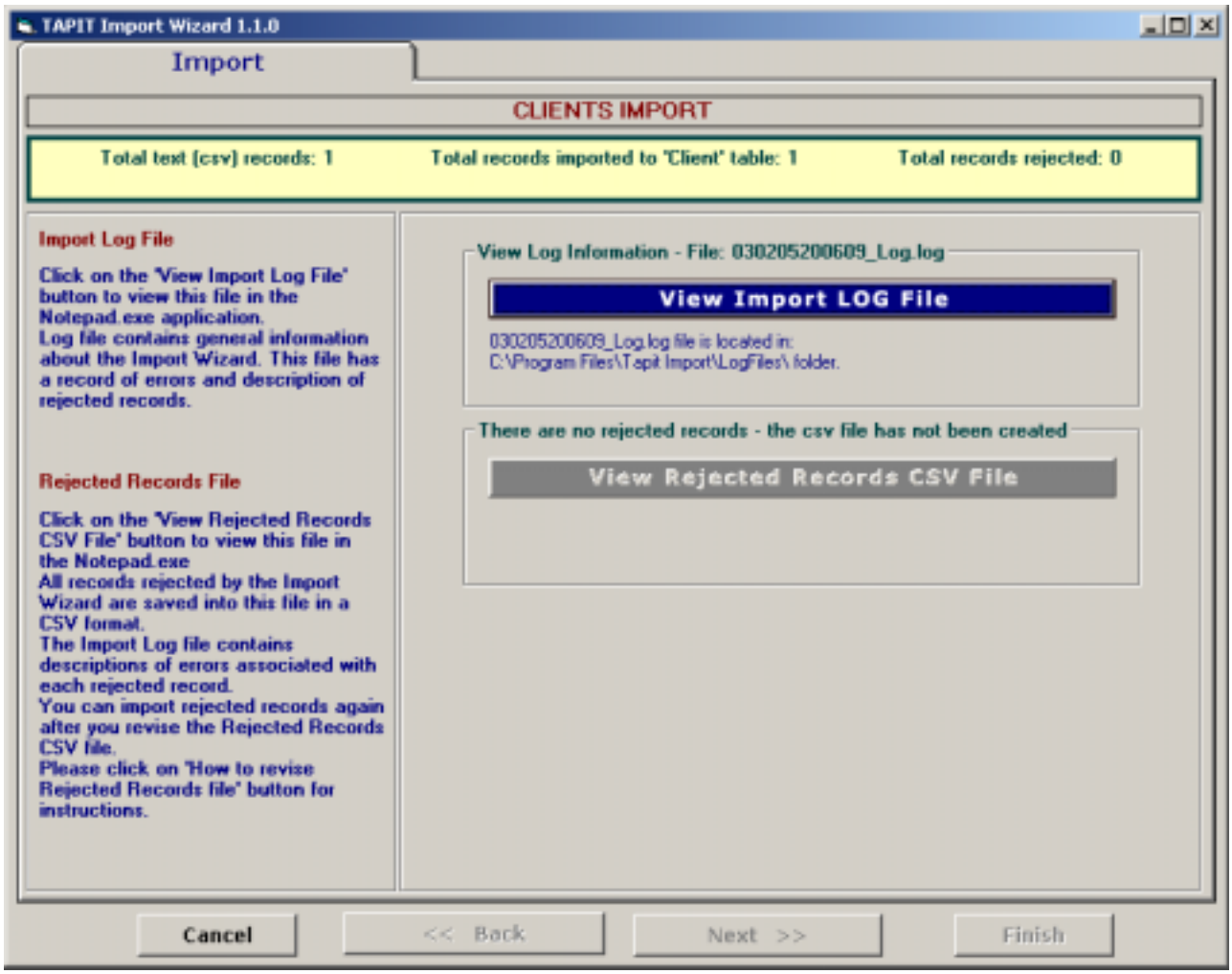


19. TAPIT Import Wizard will import records from the Rejected Records file.
When import is finished it will display the following message:



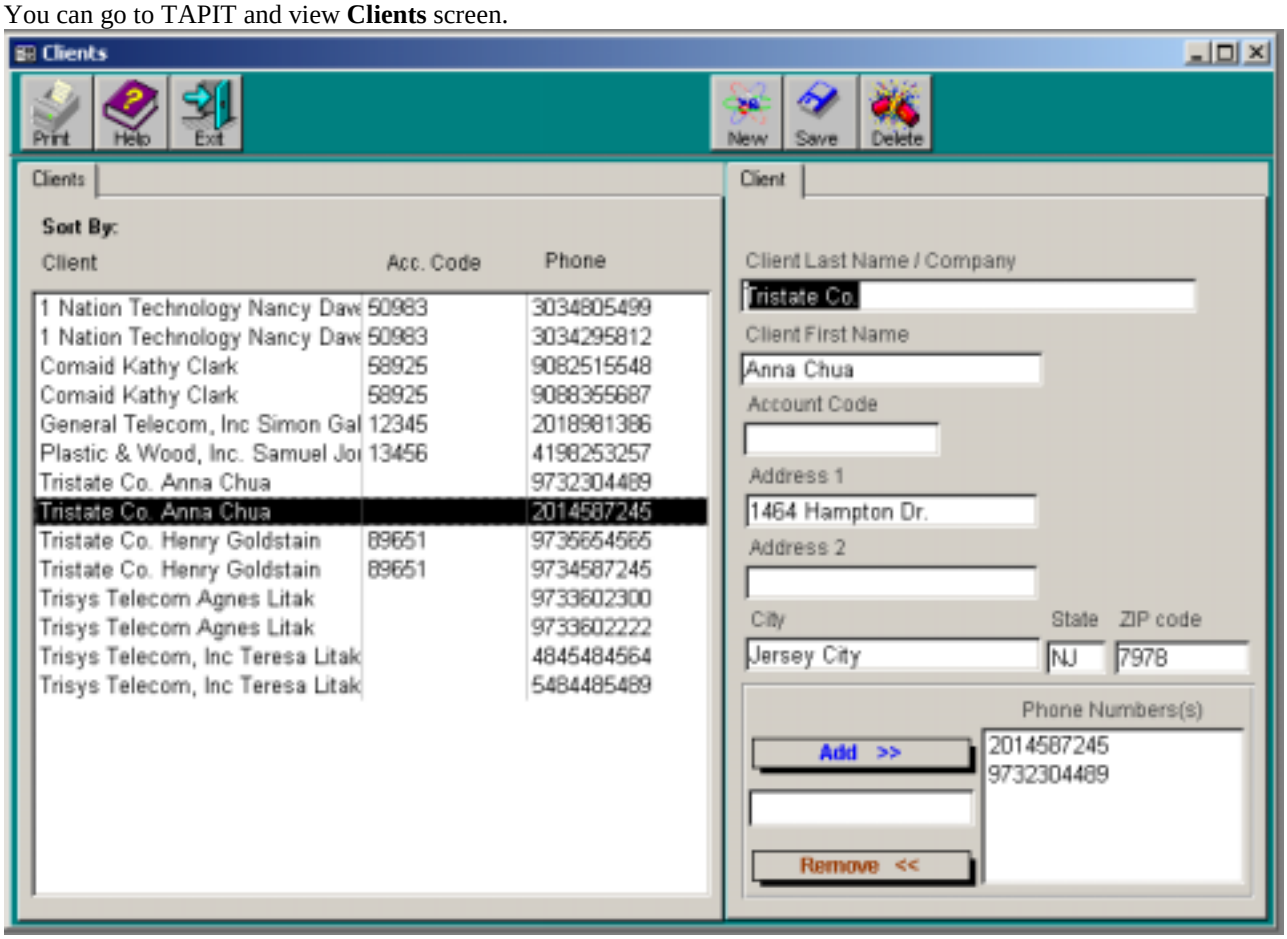
Click on **OK**.

20. The Import screen changes to reflect the new import results (import from Rejected Records csv file).
In our example:
"Total text (csv) records: 1" – total number of text records in the Rejected Records csv file.
"Total records imported to 'Client' table:1" – the number of text records from the Rejected Records csv file imported to TAPIT.
"Total records rejected: 0" – the number of rejected records. This number should be 0 if all of the problems have been corrected in the Rejected Records csv file.



Client import is completed.

21. You can go to TAPIT and view **Clients** screen.



USER IMPORT

Glossary of Terms

TEXT field – the field in CSV file that needs to be imported to TAPIT.

TAPIT field – the field in TAPIT Database. TEXT field is imported to TAPIT filed.

TEXT record – a record in CSV file. This record is imported to TAPIT Database to either Client or User table.

TAPIT record – a record in TAPIT Database. A record from CSV file (TEXT record) is imported to either Client or User table in TAPIT Database. Once in TAPIT Database, it becomes TAPIT record.

Before Importing Data

- TAPIT Import Wizard accepts files in a CSV (comma delimited) format.
  Use export facilities provided by the application you are importing from to create a CSV file.
- Before export, validate your data using guidelines below.

TAPIT User fields available for Import:

TAPIT User Id field is not available for import from the CSV file.
Instead TAPIT assigns a new User Id to each imported record.

TAPIT Import does not import any information concerning Departments.
Departments have to be manually created and assigned to Users via TAPIT application, when import is completed.

Each User TAPIT field can be associated with only one TEXT field except User Extension.
User records can have more than one extensions, thus User Extension can be matched with multiple TEXT fields.

User First Name

User Last Name

User Last Name is a required filed in TAPIT. If it is empty the entire User TEXT record is not saved into the TAPIT Database

User Authorization Code

There can be only one Authorization Code per User

TAPIT Authorization Code field accepts digits and letters. If characters, other then digits and letters, are found the entire User record associated with this Authorization Code is rejected.

99358– valid format.

UPSCOM – valid format.

99**#8 – invalid format.

Authorization Code cannot be more than 16 digits/letters.

Authorization Code cannot be duplicated in TAPIT Database. If an Authorization Code already exists in TAPIT Database the entire record associated with this Authorization Code is rejected.

For example:

There is a USER in TAPIT with the Authorization Code “8858”.
In this case the attempt to import record:
“Mark”,”Brown”,”**8858**”,”.05”,”.10”,””,”125”,”118”123” will be unsuccessful because it would duplicate the Account Code –“ 8858”.

If an Authorization Code is duplicated within the CSV file the record with the first instance of this Authorization Code is saved in TAPIT Database. All subsequent records, containing the same Authorization Code, are rejected.

For example:

“Mark”,”Brown”,”**8858**”,”.04”,”.05”,””,”102”,”101”103” – this record is saved

““John”,”Smith”,”**8858**”,”.05”,”.10”,””,”125”,”118”123” - this record is rejected because it would duplicate the Authorization Code “8858”.

User Surcharge Per Minute

Surcharge Per Minute has to be a numeric value – the only other character allowed is $ and a decimal point.

User Surcharge Per Call

Surcharge Per Call has to be a numeric value – the only other character allowed is $ and a decimal point.

User Multiplier (percent)

Surcharge Per Call has to be a numeric value – the only other character allowed is % and a decimal point.

User Extension

User can have multiple extensions – multiple TEXT fields can be matched with the TAPIT Extension filed.

User Extension field allows ONLY for digits. No other characters are accepted. If other characters are found the entire User record associated with this Extension is rejected.
115– valid format.

ext. 115 – invalid format.

Extensions cannot have more than 9 digits

Extension cannot be duplicated in TAPIT. If an Extension already exists in TAPIT Database the entire record associated with this Extension is rejected.

For example:

There is a USER in TAPIT with the Extension “125”.
In this case the attempt to import record:
“Mark”,”Brown”,”8858”,”.05”,”.10”,””,”**125**”,”118”123” will be unsuccessful because it would duplicate the Extension –“ 125”.

If an Extension is duplicated within the CSV file the record with the first instance of this Extension is saved in TAPIT Database. All subsequent records containing the same Extension are rejected.

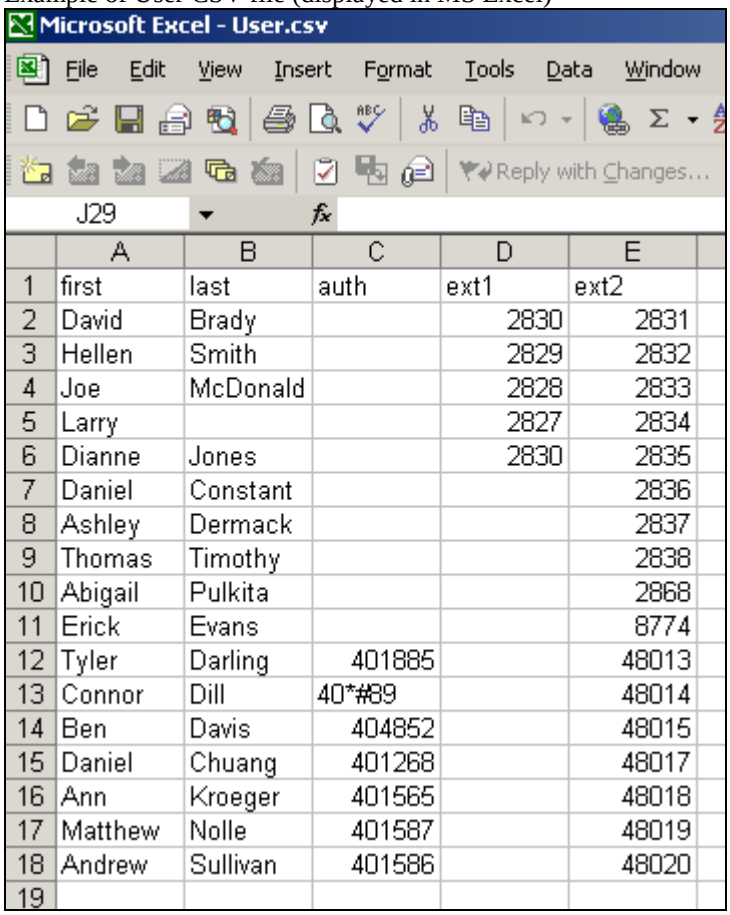
For example:

“Mark”,”Brown”,”8858”,”.04”,”.05”,””,”102”,”**125**”103” – this record is saved.

““John”,”Smith”,”4589”,”.05”,”.10”,””,”**125**”,”118”123” - this record is rejected because it would duplicate the extension “125”.

Importing Users without Departments

Example of User CSV file (displayed in MS Excel)

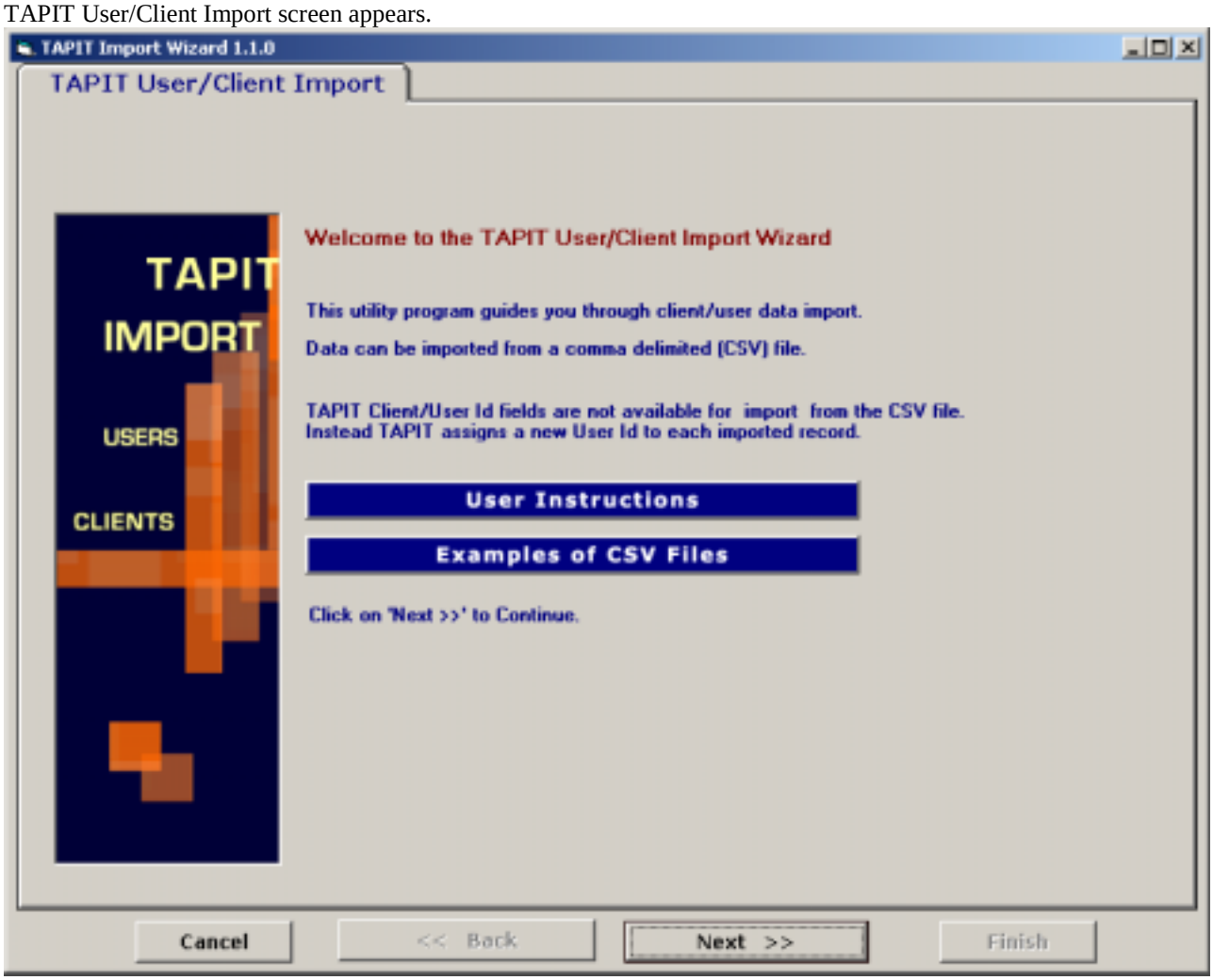


	A	B	C	D	E
1	first	last	auth	ext1	ext2
2	David	Brady		2830	2831
3	Hellen	Smith		2829	2832
4	Joe	McDonald		2828	2833
5	Larry			2827	2834
6	Dianne	Jones		2830	2835
7	Daniel	Constant			2836
8	Ashley	Dermack			2837
9	Thomas	Timothy			2838
10	Abigail	Pulkita			2868
11	Erick	Evans			8774
12	Tyler	Darling	401885		48013
13	Connor	Dill	40*#89		48014
14	Ben	Davis	404852		48015
15	Daniel	Chuang	401268		48017
16	Ann	Kroeger	401565		48018
17	Matthew	Nolle	401587		48019
18	Andrew	Sullivan	401586		48020
19					

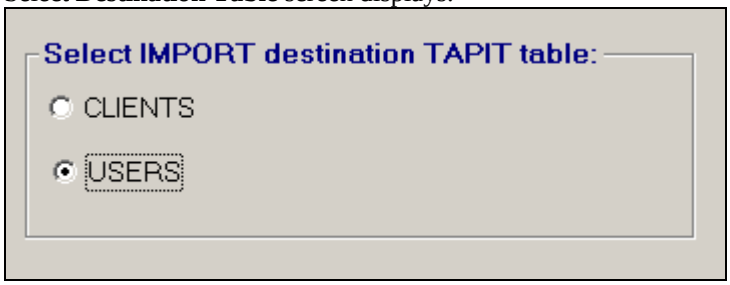
Line No.	**Is it going to be imported to TAPIT?**	**Why is the User record rejected?**
Line 1	NO	This is the header line. TAPIT Import Wizard prompts to indicate if the CSV file contains headers. If the indicator is set properly this line will not be imported to TAPIT.
Line 2 -4	YES	
Line 5	NO	The required USER filed Last Name is left blank.
Line 6	NO	The Extension field does not accept any duplicates. Extension 2830 already exists in TAPIT because this extension has already been used for user on line 2 and line 2 has already been imported.
Lines 7-12	YES	
Line 13	NO	The Authorization Code TAPIT field accepts only digits and letters. The 40*#89 is not a correct format because it contains other characters (*#).
Lines 14-19	YES	

Using Import Wizard

1. Start Import Wizard by clicking on **START/TAPIT/TAPIT Import**.
   TAPIT User/Client Import screen appears.



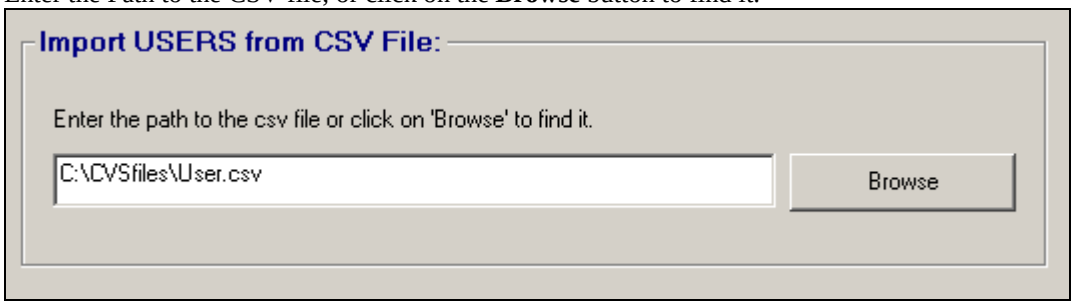
2. Click on **Next**.
   Select **Destination Table** screen displays.



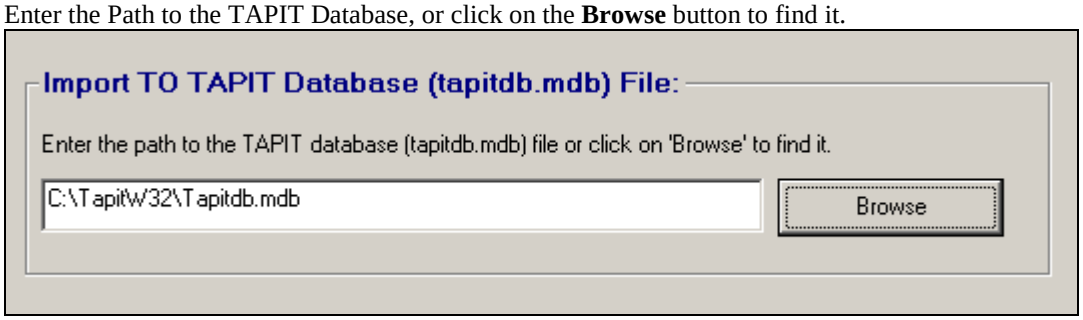
   Click on **Users** option to check it.
3. Click on **Next**.
   Import Departments? screen appears.
   In this example the CSV file does not contain any Departments.

Click on No to the **Do you want to import Departments?**

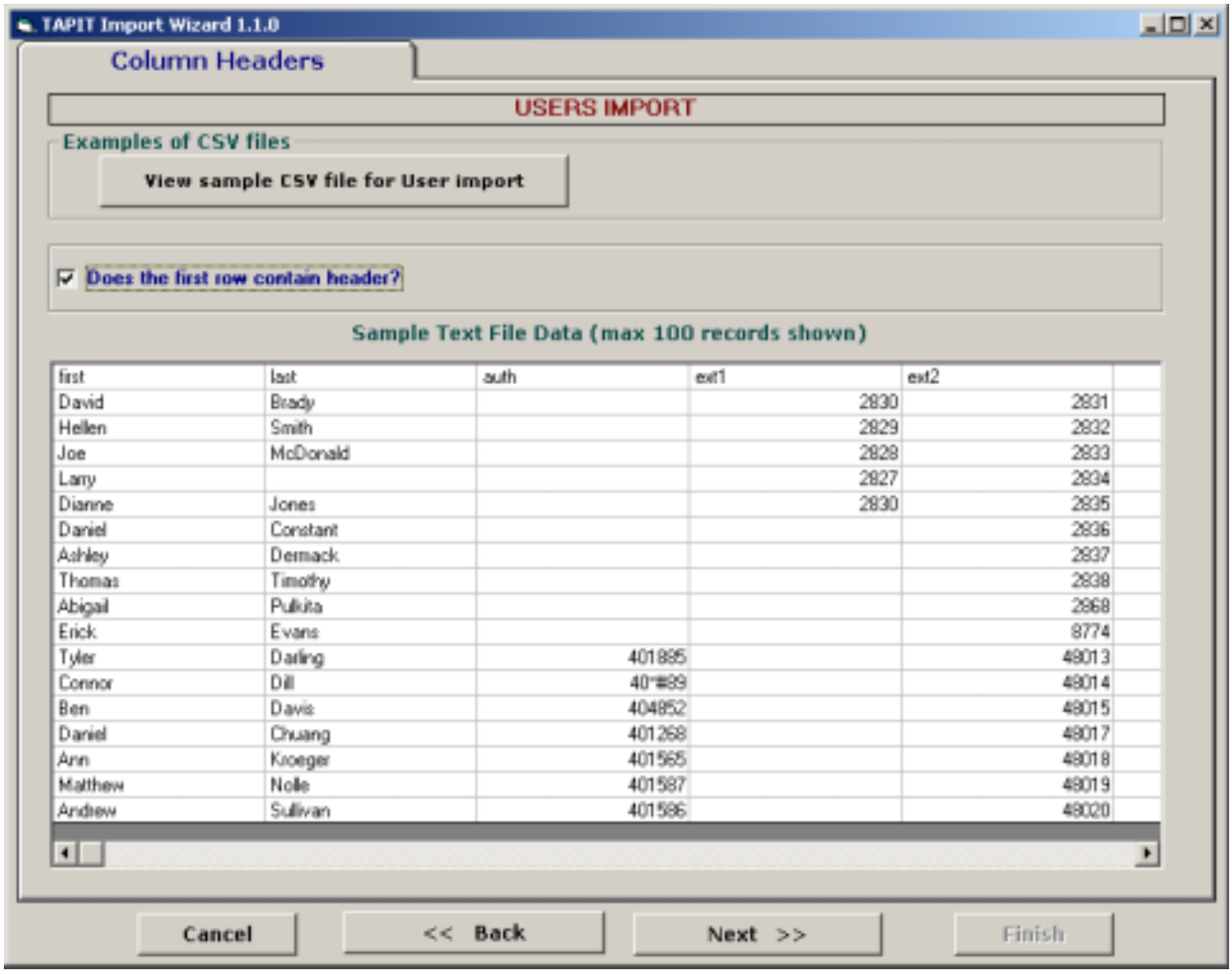
4. Click on **Next**.
   Locate Files screen opens.
   Enter the Path to the CSV file, or click on the **Browse** button to find it.



   Enter the Path to the TAPIT Database, or click on the **Browse** button to find it.

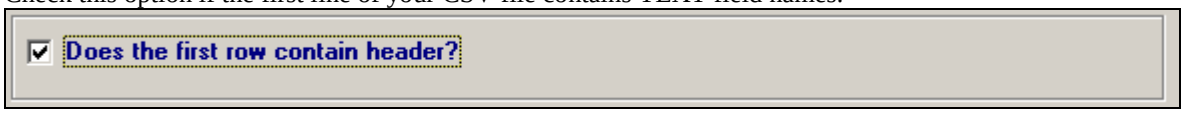


5. Click on **Next**
   Column Headers screen comes up.



first	last	auth	ext1	ext2
David	Brady		2830	2831
Hellen	Smith		2829	2832
Joe	McDonald		2828	2833
Lamy			2827	2834
Dianne	Jones		2830	2835
Daniel	Constant			2836
Ashley	Dermack			2837
Thomas	Timothy			2838
Abigail	Pulkita			2868
Erick	Evans			8774
Tyler	Darling	401885		48013
Connor	Dill	40*#89		48014
Ben	Davis	404852		48015
Daniel	Chuang	401268		48017
Ann	Kroeger	401565		48018
Matthew	Nolle	401587		48019
Andrew	Sullivan	401586		48020

Does the first row contain headers?
Check this option if the first line of your CSV file contains TEXT field names.

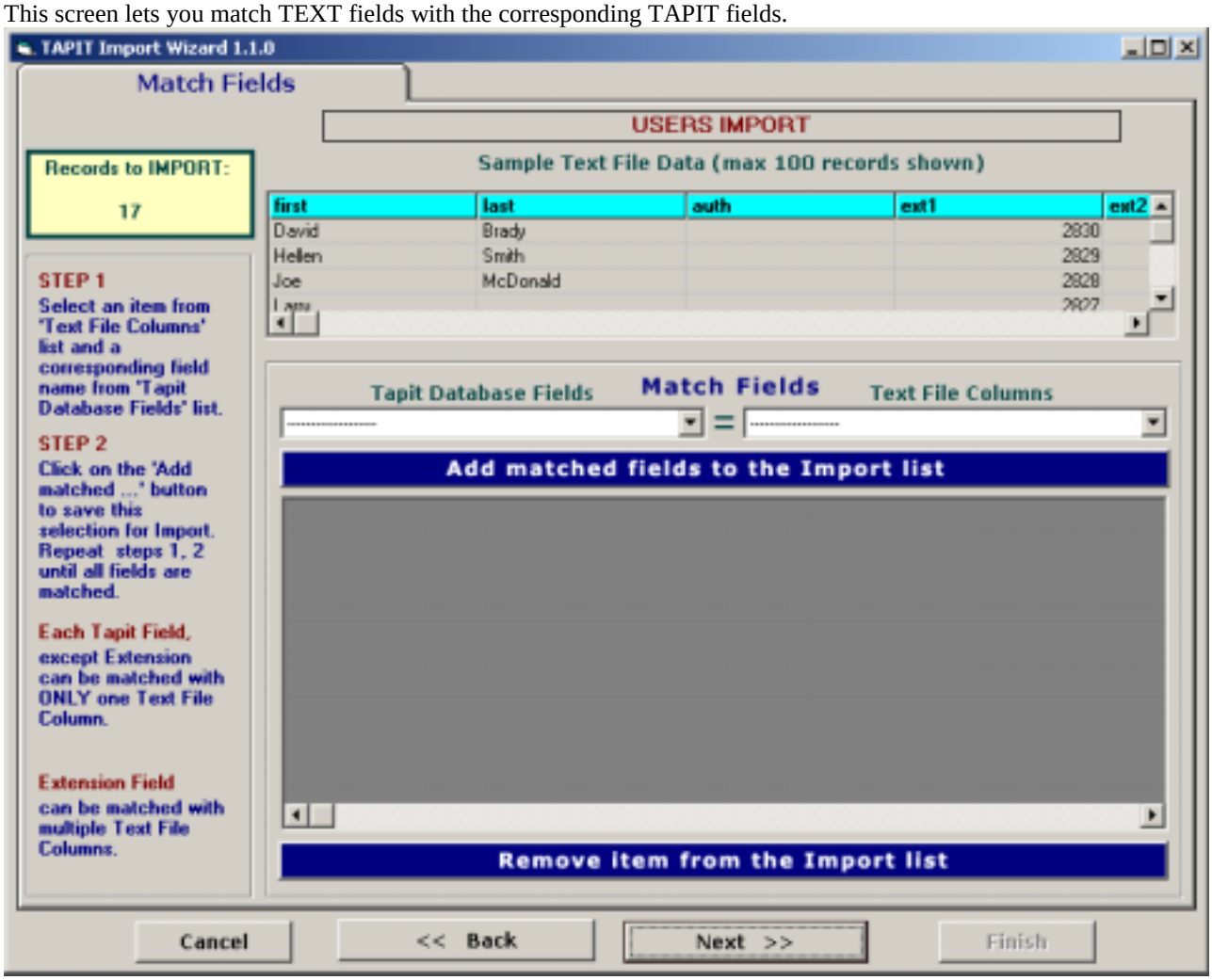


6. The **Sample Text File Date** is displayed on your screen. Only the first 100 lines of your CSV file are displayed. Please check if the CSV data is separated into columns properly.

Sample Text File Data (max 100 records shown)

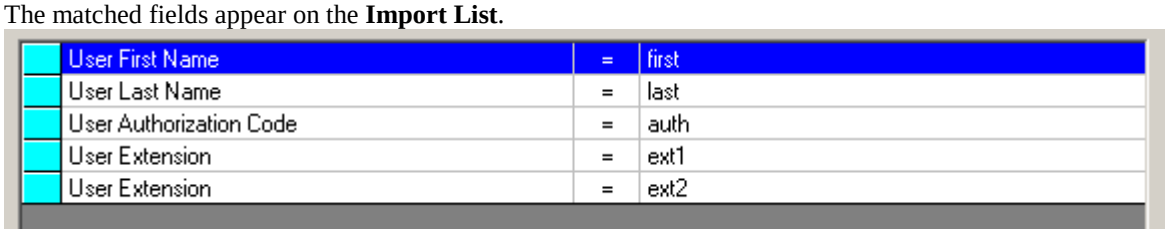
first	last	auth	ext1	ext2
David	Brady		2830	2831
Hellen	Smith		2829	2832
Joe	McDonald		2828	2833
Larry			2827	2834
Dianne	Jones		2830	2835
Daniel	Constant			2836
Ashley	Dermack			2837
Thomas	Timothy			2838
Abigail	Pulkita			2868
Erick	Evans			8774
Tyler	Darling	401885		48013
Connor	Dill	40*#89		48014

7. Click on **Next**.
   The **Match Fields** screen appears.
   This screen lets you match TEXT fields with the corresponding TAPIT fields.



8. **Sample Text File Data** on the top of the screen, displays up to 100 records of the CSV TEXT file data.
   The top row is the names of the TEXT file columns. These names are listed in the **Text File Columns** list box.
   Sample Data is provided as a reference in field matching. so you can check what data each column contains.
9. Select a TAPIT field from **TAPIT Database Fields** list box and then a corresponding item from **Text File Columns**.

10. Click on **Add matched fields to the Import List**.
    The matched fields appear on the **Import List**.



Repeat steps 9 and 10 until you're done with matching fields.

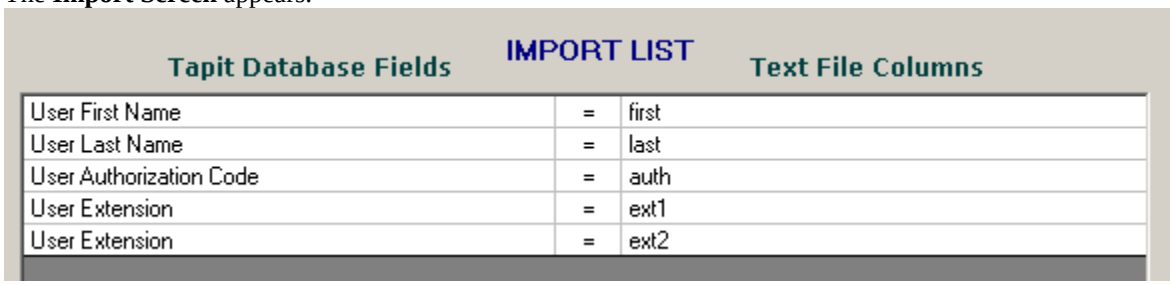
WHEN MATCHING USER FIELDS

User Last Name has to be included in the **Import List**. This TEXT flied (column) cannot be empty.

TAPIT **User Extension** is the only field that can be matched with multiple TEXT fields (columns). User can have multiple extensions.

All other TAPIT fields can be matched with only one TEXT field (column).

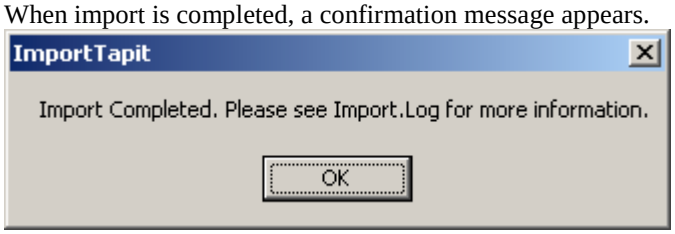
11. When all fields are matched, click on **Next**.
    The **Import Screen** appears.



Tapit Database Fields	IMPORT LIST	Text File Columns
User First Name	=	first
User Last Name	=	last
User Authorization Code	=	auth
User Extension	=	ext1
User Extension	=	ext2

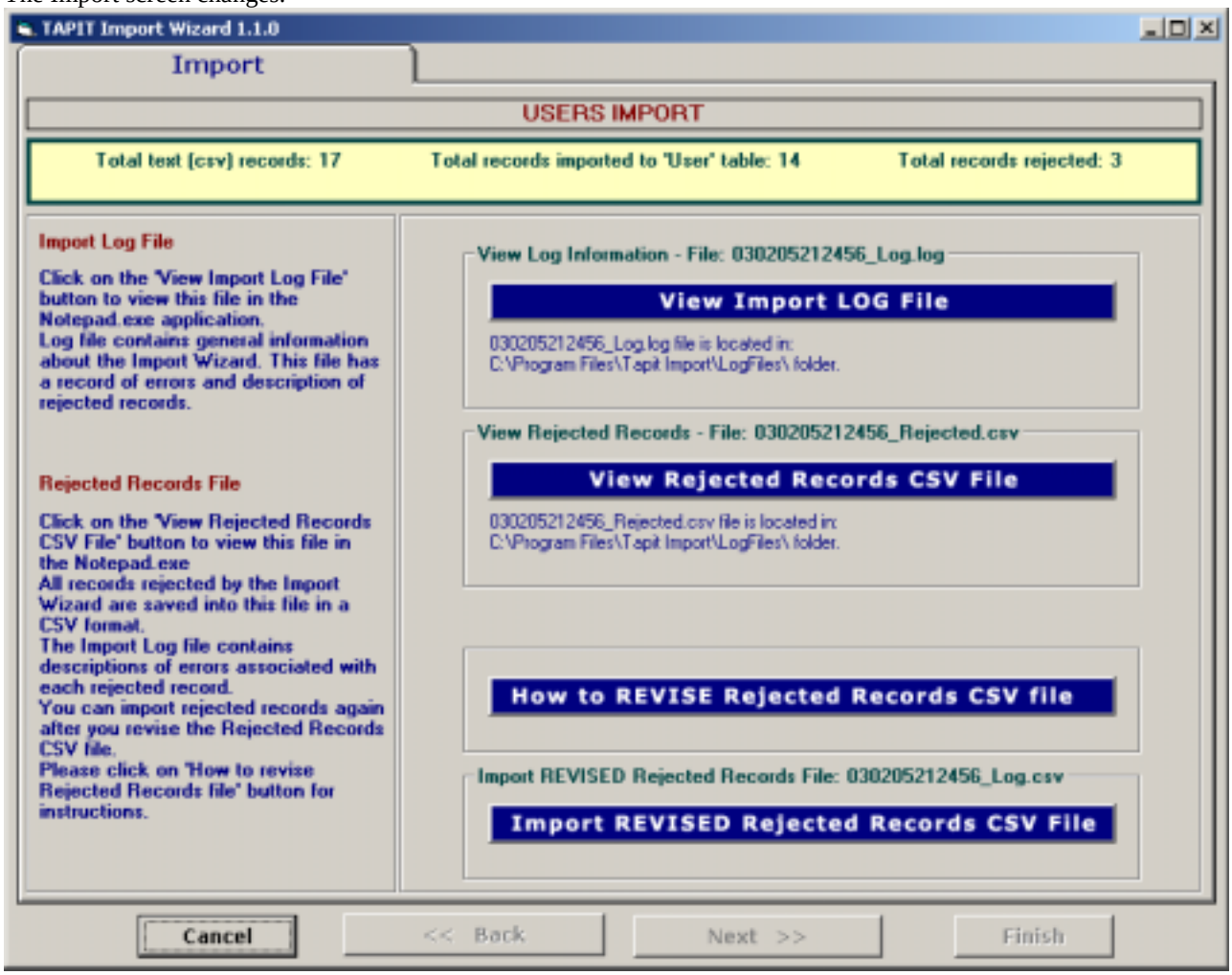
    This screen displays the final field selection for import.
    Import Wizard imports data the way it is matched in the **Import List**.
    If you need to edit the **Import List**, click on the **Back** button to go back to the **Match Fields** screen.
    Add or **Remove** rows from the **Import List**.

    Otherwise, click on **Finish** to import.
12. When import is completed, a confirmation message appears.



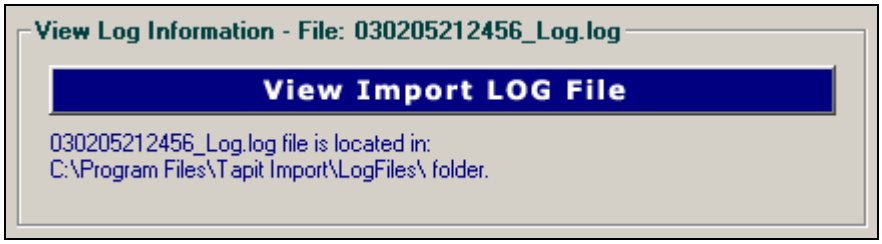
    Click on **OK**.

13. The Import screen changes.



Top of the Import screen displays Import statistics.
Following example below – the CSV file contained 17 total TEXT records, 14 TEXT records were successfully saved (imported) into the TAPIT Database. 3 TEXT records were rejected (were not imported).

14. To find out more about rejected records click on the **View Import Log File** button.



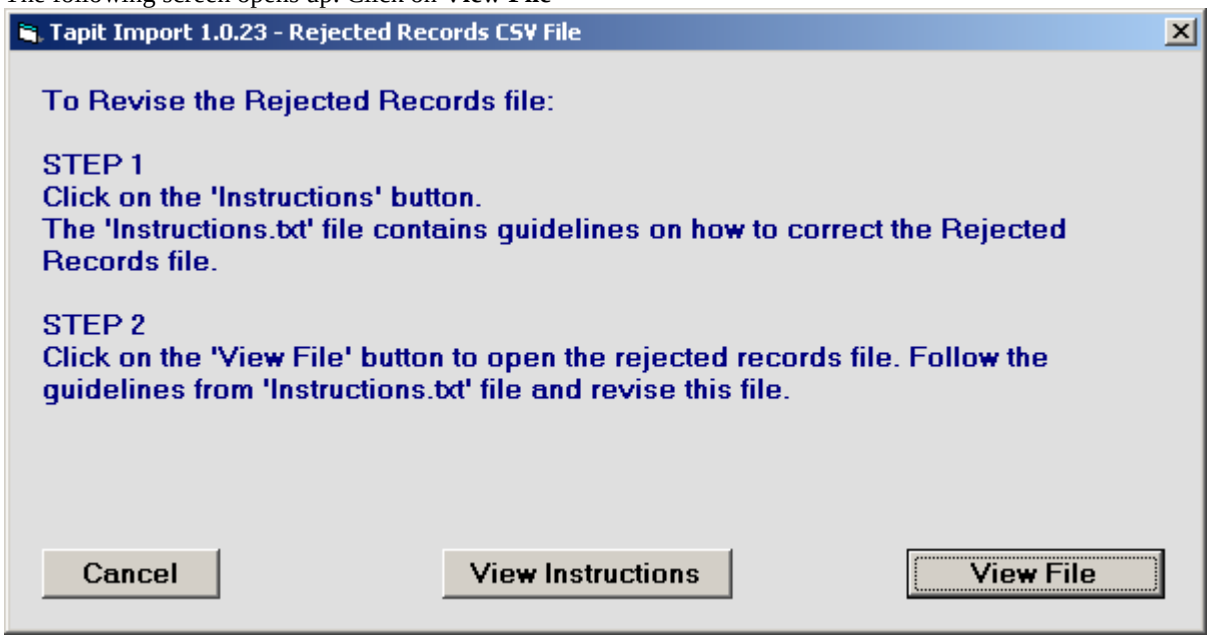
The Log file opens in Notepad..

==========USERS IMPORT==========

Import FROM CSV file C:\CVSfiles\User.csv
Import TO the C:\TAPITW32\TAPITdb.mdb database, User table
**********03/02/05 21:42**********
****
FIELDS ARE MATCHED THE FOLLOWING WAY:
User First Name = first (Field0 UserFirstName)
User Last Name = last (Field1 UserLastName)
User Authorization Code = auth (Field2 UserAuthCode)
User Extension = ext1 (Field3 Extension)
User Extension = ext2 (Field4 Extension)
****
Rejected rec # 1last is empty. This a required field in User table and cannot be left empty.
Rejected rec # 2Extension: "2830" already exists in a database and has not been saved in TAPIT
Rejected rec # 3auth: "40*#89" contains illegal characters. It can only contain digits and letters.
**********03/02/05 21:42**********
Import to the User table from file C:\CVSfiles\User.csv is completed
17 total CSV file records.
14 imported records.
3 rejected records.
****

15. To view rejected records click on the **View Rejected Records CSV File** button

16. The following screen opens up. Click on **View File**



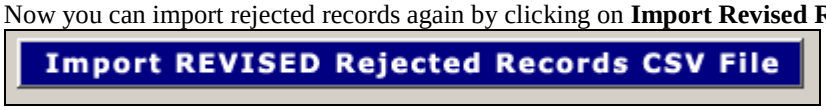
The Rejected Records csv file opens in Notepad. The below is the Rejected Records file produced by our example import (how it is displayed in Notepad).
The entries in bold are the entries to be corrected – the log file above has a list of these entries and information

on what needs to be corrected.
The first row of our rejected file is the headers. The Rejected Records file headers reflect headers used originally in our CSV import file.

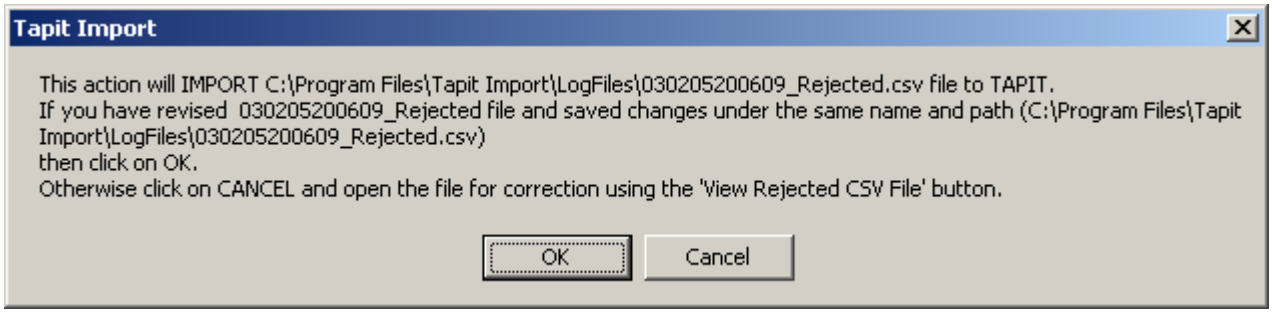
"Rec Number","last","first","auth","ext1","ext2"
"1","","Larry","","2827","2834"
"2","Jones","Dianne","","**2830**","2835"
"3","Dill","Connor","**40*#89**","","48014"

The revised Rejected Records file:
"Rec Number","last","first","auth","ext1","ext2"
"1","**Brown**","Larry","","2827","2834"
"2","Jones","Dianne","","**2855**","2835"
"3","Dill","Connor","**402589**","","48014"
The Rejected Records file needs to be saved in Notepad under the same name.

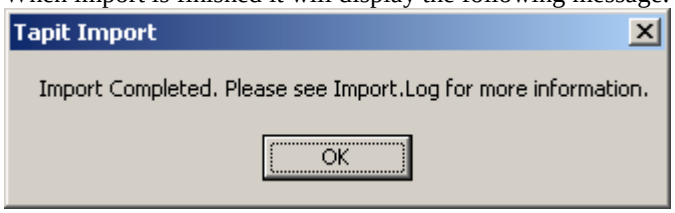
17. Now you can import rejected records again by clicking on **Import Revised Rejected Records CSV File**.



18. If you have corrected the Rejected Records file and saved under the same name (overwritten) then click on **OK** to continue.

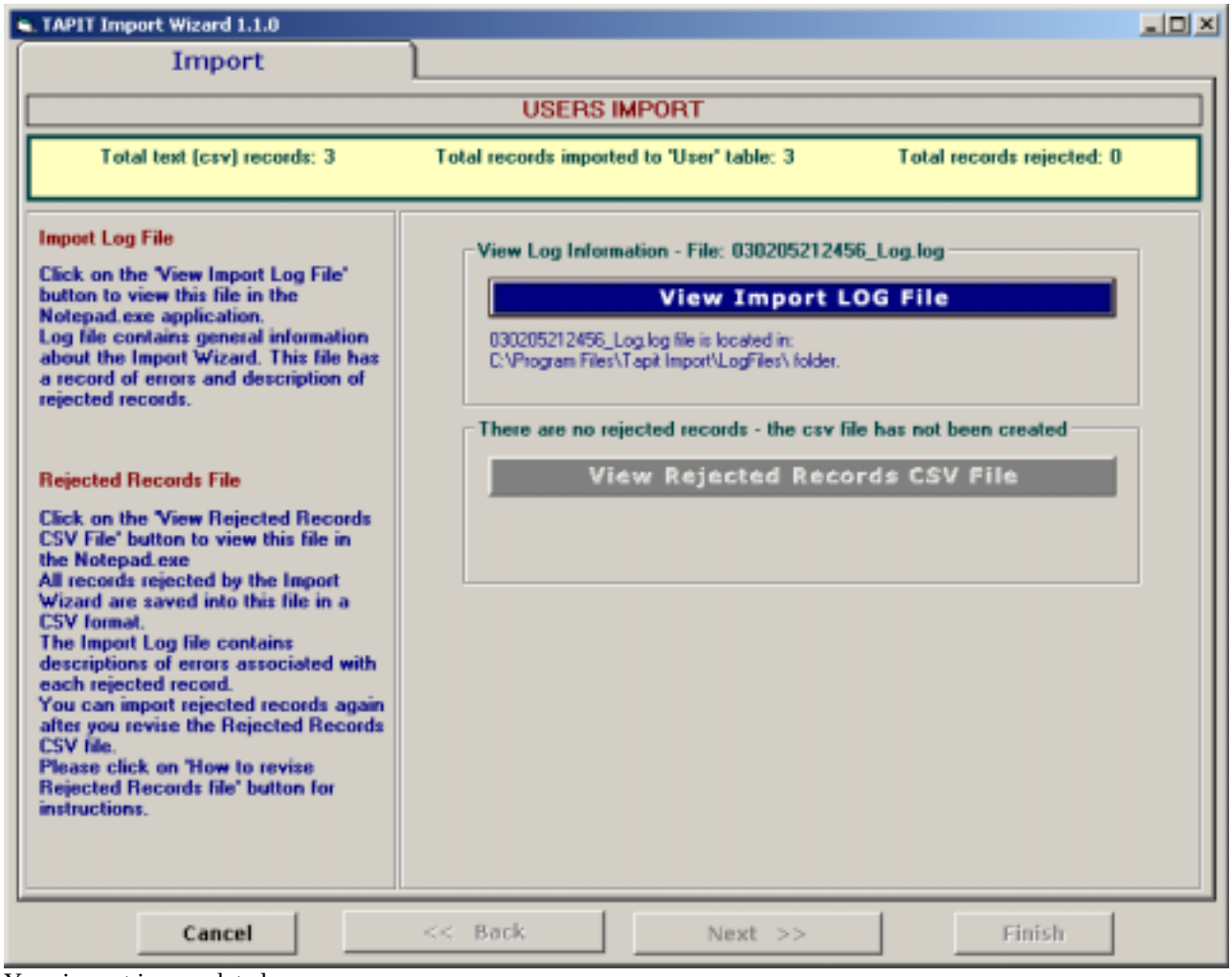


19. TAPIT Import Wizard will import records from the Rejected Records file.
When import is finished it will display the following message:



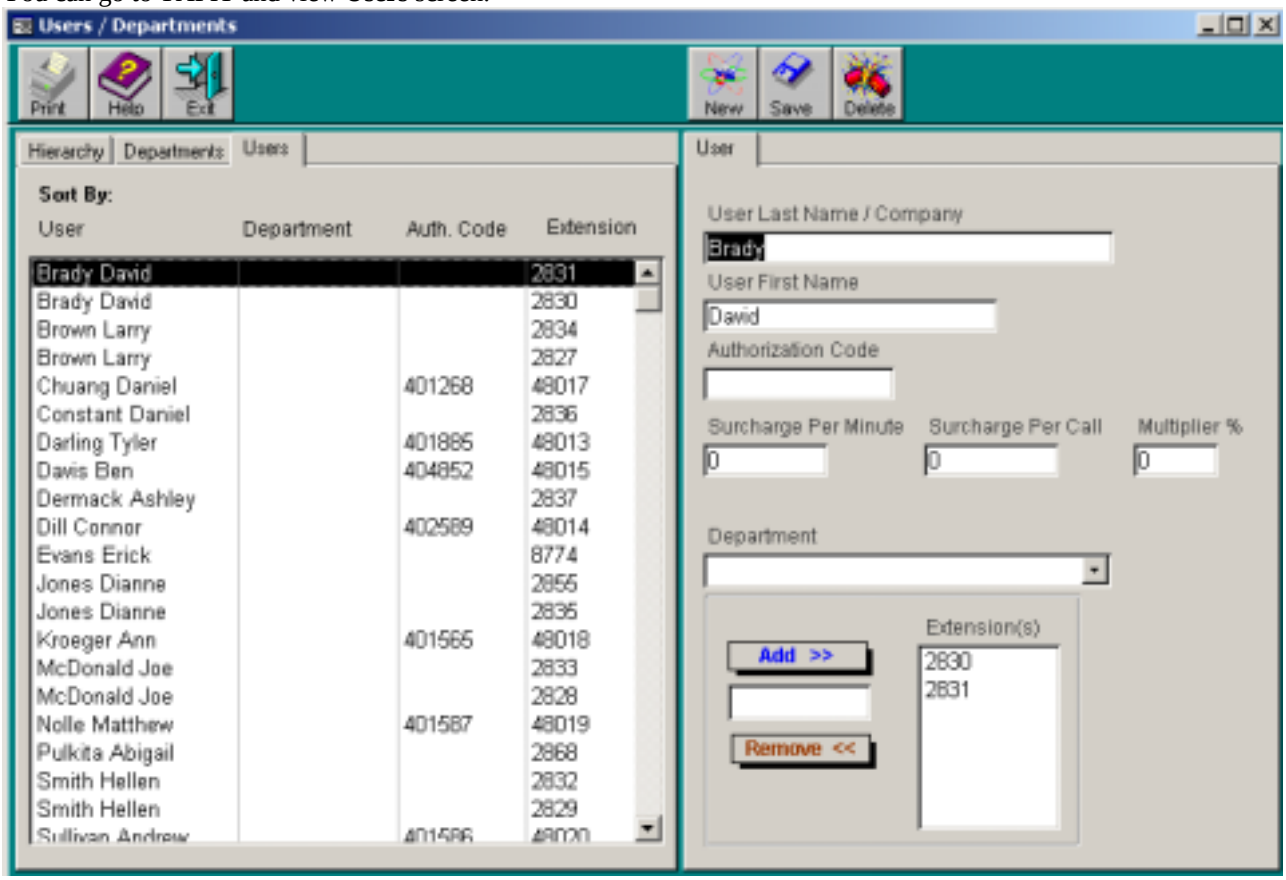
Click on **OK**.

20. The Import screen changes to reflect the new import results (import from Rejected Records csv file).
In our example:
"Total text (csv) records: 3" – total number of text records in the Rejected Records csv file.
"Total records imported to 'User' table:3" – the number of text records from the Rejected Records csv file imported to TAPIT.
"Total records rejected: 0" – the number of rejected records. This number should be 0 if all of the problems have been corrected in the Rejected Records csv file.



Your import is completed.

21. You can go to TAPIT and view **Users** screen.

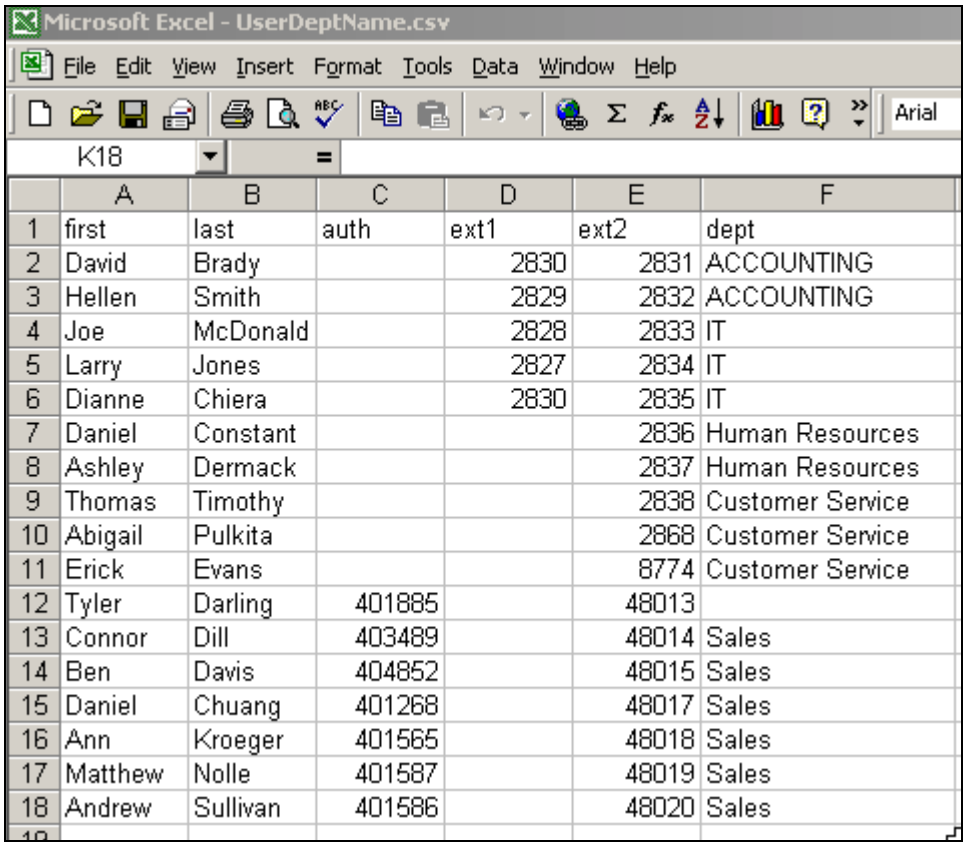


Importing Users WITH Departments

Using the same csv file to import Users and Departments

Users and Departments can be imported from the same CSV file.
The CSV file has to contain User information as well as list **Department Names** for the corresponding Users (see the example CSV file below).

Example of a User\Department CSV file displayed in MS Excel:


Microsoft Excel - UserDeptName.csv

File Edit View Insert Format Tools Data Window Help

Arial

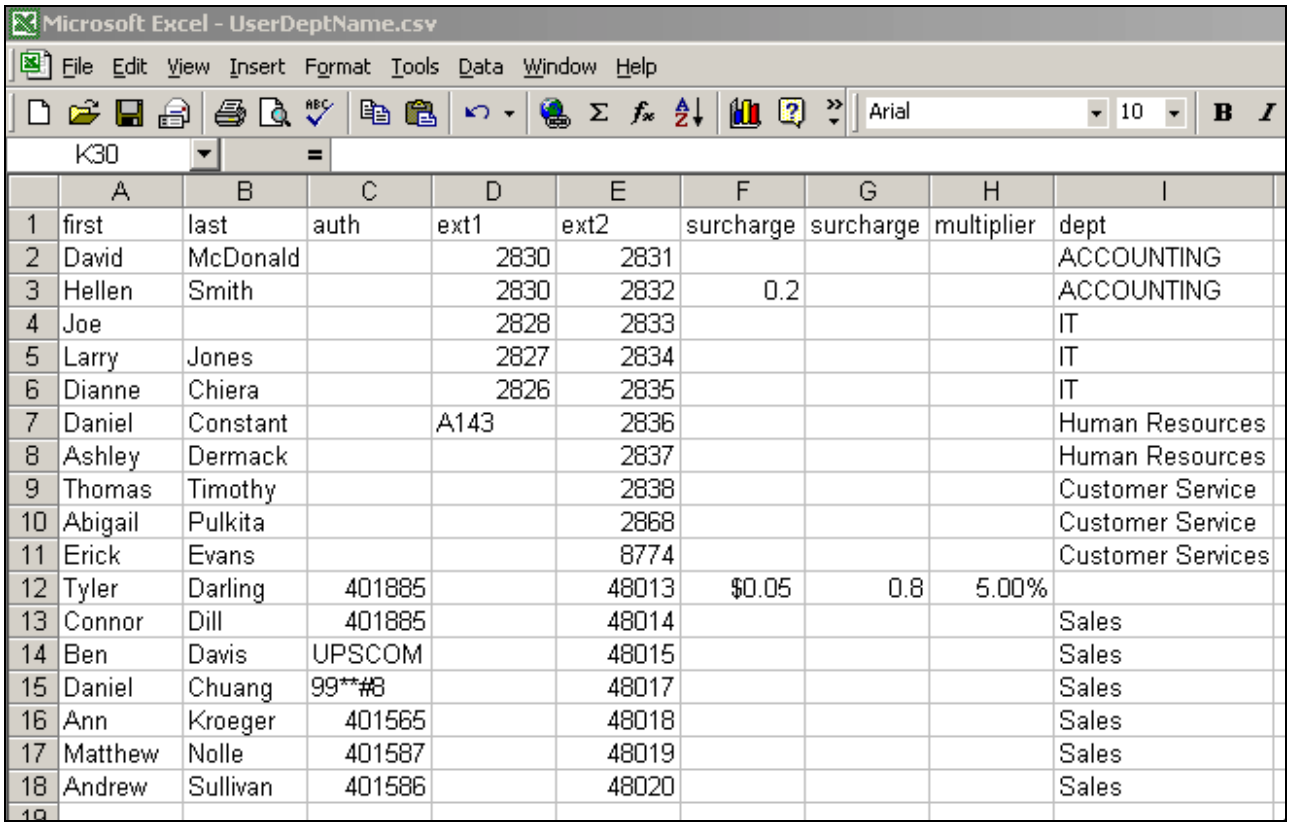
K18 =

	A	B	C	D	E	F
1	first	last	auth	ext1	ext2	dept
2	David	Brady		2830	2831	ACCOUNTING
3	Hellen	Smith		2829	2832	ACCOUNTING
4	Joe	McDonald		2828	2833	IT
5	Larry	Jones		2827	2834	IT
6	Dianne	Chiera		2830	2835	IT
7	Daniel	Constant			2836	Human Resources
8	Ashley	Dermack			2837	Human Resources
9	Thomas	Timothy			2838	Customer Service
10	Abigail	Pulkita			2868	Customer Service
11	Erick	Evans			8774	Customer Service
12	Tyler	Darling	401885		48013	
13	Connor	Dill	403489		48014	Sales
14	Ben	Davis	404852		48015	Sales
15	Daniel	Chuang	401268		48017	Sales
16	Ann	Kroeger	401565		48018	Sales
17	Matthew	Nolle	401587		48019	Sales
18	Andrew	Sullivan	401586		48020	Sales

In our example:
Line 1 is the header.
Each line, except line 12, lists a Department Name (dept) corresponding to a User.
Department Names associate Users with the Departments.

Format of a User\Department CSV file

Example of a User\Department CSV file displayed in MS Excel:


Microsoft Excel - UserDeptName.csv

File Edit View Insert Format Tools Data Window Help

Arial 10 B I

K30 =

	A	B	C	D	E	F	G	H	I
1	first	last	auth	ext1	ext2	surcharge	surcharge	multiplier	dept
2	David	McDonald		2830	2831				ACCOUNTING
3	Hellen	Smith		2830	2832	0.2			ACCOUNTING
4	Joe			2828	2833				IT
5	Larry	Jones		2827	2834				IT
6	Dianne	Chiera		2826	2835				IT
7	Daniel	Constant		A143	2836				Human Resources
8	Ashley	Dermack			2837				Human Resources
9	Thomas	Timothy			2838				Customer Service
10	Abigail	Pulkita			2868				Customer Service
11	Erick	Evans			8774				Customer Services
12	Tyler	Darling	401885		48013	$0.05	0.8	5.00%	
13	Connor	Dill	401885		48014				Sales
14	Ben	Davis	UPSCOM		48015				Sales
15	Daniel	Chuang	99**#8		48017				Sales
16	Ann	Kroeger	401565		48018				Sales
17	Matthew	Nolle	401587		48019				Sales
18	Andrew	Sullivan	401586		48020				Sales

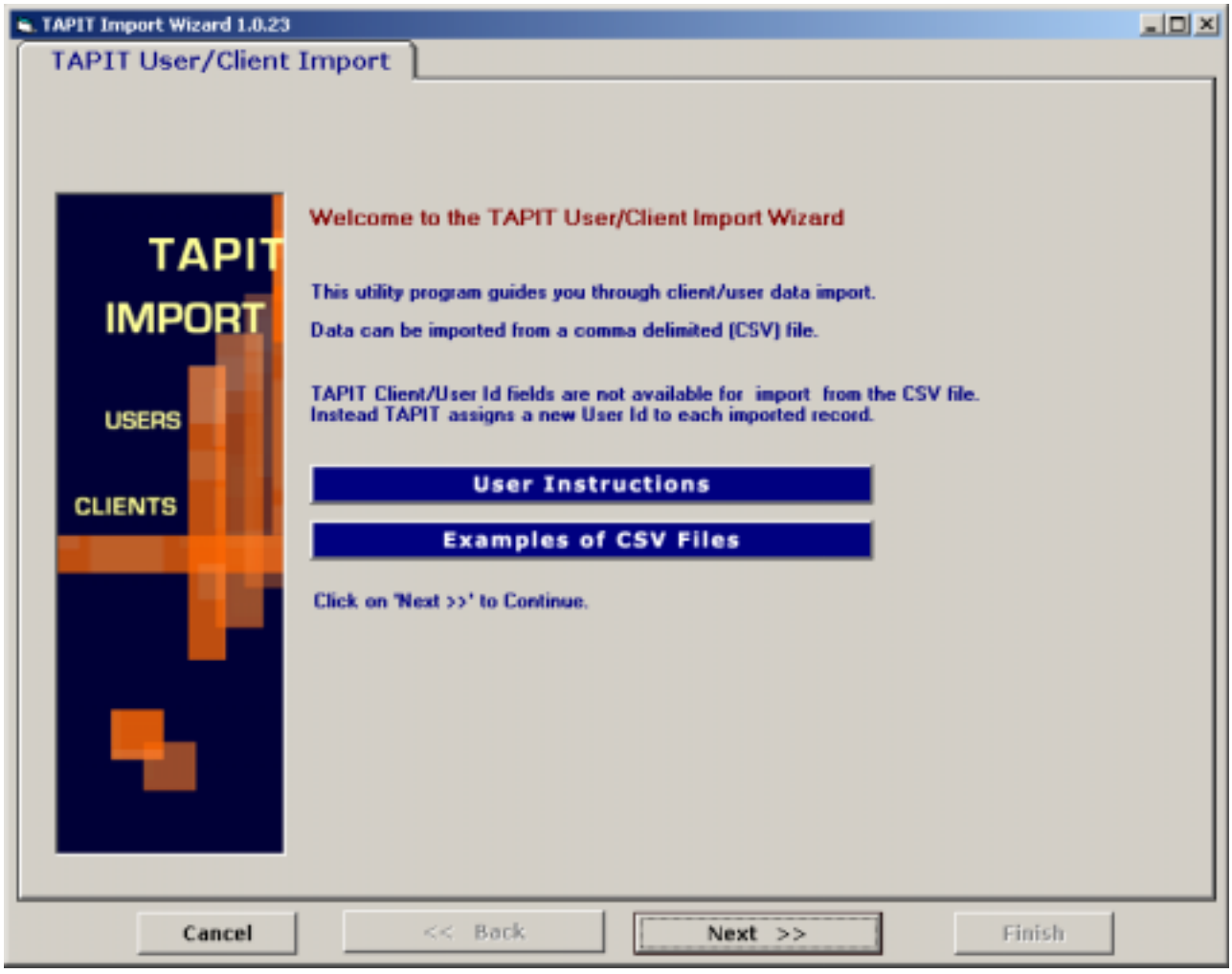
Line No.	**Is it going to be imported to TAPIT?**	**Why is the User record rejected?**
Line 1	NO	This is the header line. TAPIT Import Wizard prompts to indicate if the CSV file contains headers. If the indicator is set properly this line will not be imported to TAPIT.
Line 2	YES	
Line 3	NO	The Extension field does not accept any duplicates. Extension 2830 already exists in TAPIT because this extension has already been used for user on line 2 and line 2 has already been imported.
Line 4	NO	The required USER filed Last Name is left blank.
Lines 5-6	YES	
Line 7	NO	The Extension TAPIT field accepts only digits. The A143 is not a correct format because it contains a letter.
Lines 8-13	YES	
Line 14	NO	The Authorization Code TAPIT filed does not accept any duplicates. Authorization Code 401885 already exists in TAPIT because this code has already been used for user on line 13 and line 13 has already been imported.
Line 15	NO	The Authorization Code TAPIT field accepts only digits and letters. The 99**#8 is not a correct format because it contains other characters (*#).
Lines 16-18	YES	

NOTE:

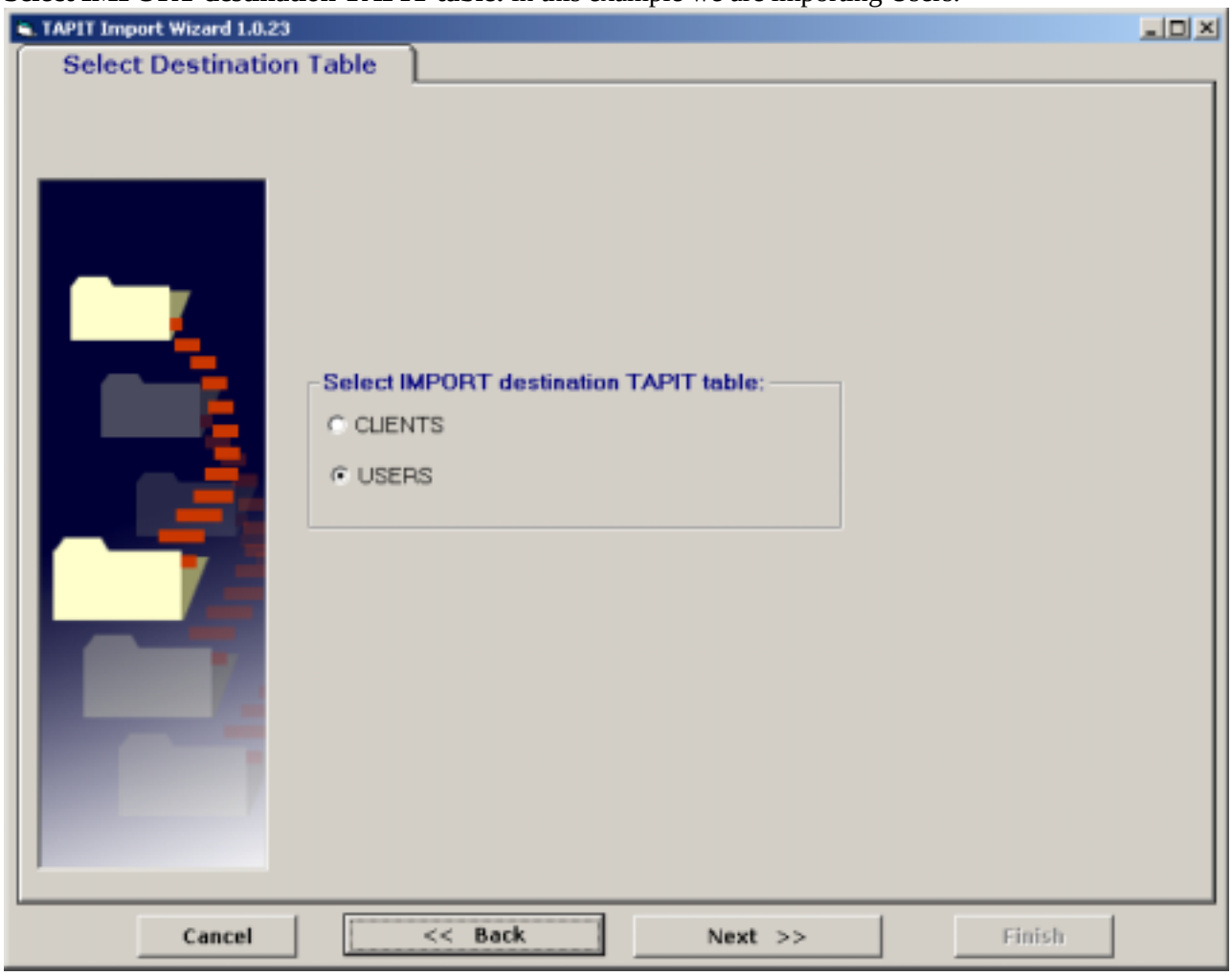
- Line 11 – Department Name has a typo. It is listed as Customer Service**s** instead of Customer Service.
  As a result Customer Service**s** will be created as an additional Department and the user from line 11 (Erick Evans) will be associated with Customer Service**s** instead of Customer Service.
- If a user has **multiple extensions** they need to be listed on the same line with this user (as shown above lines 2 through 5).

Using Import Wizard

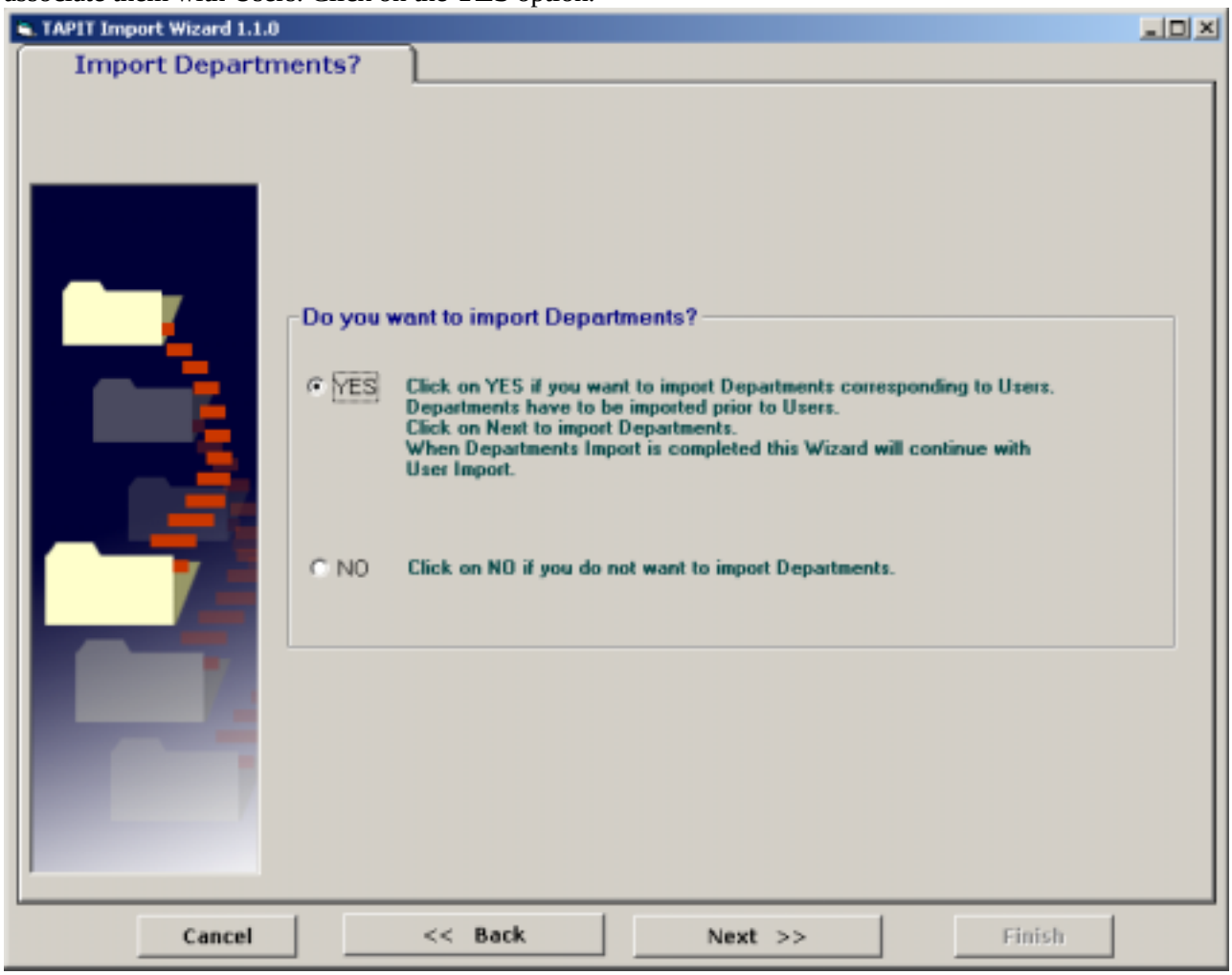
1. Start **TAPIT Import Wizard** by clicking on **START/TAPIT/TAPIT Import**. **TAPIT User/Client Import** screen appears.



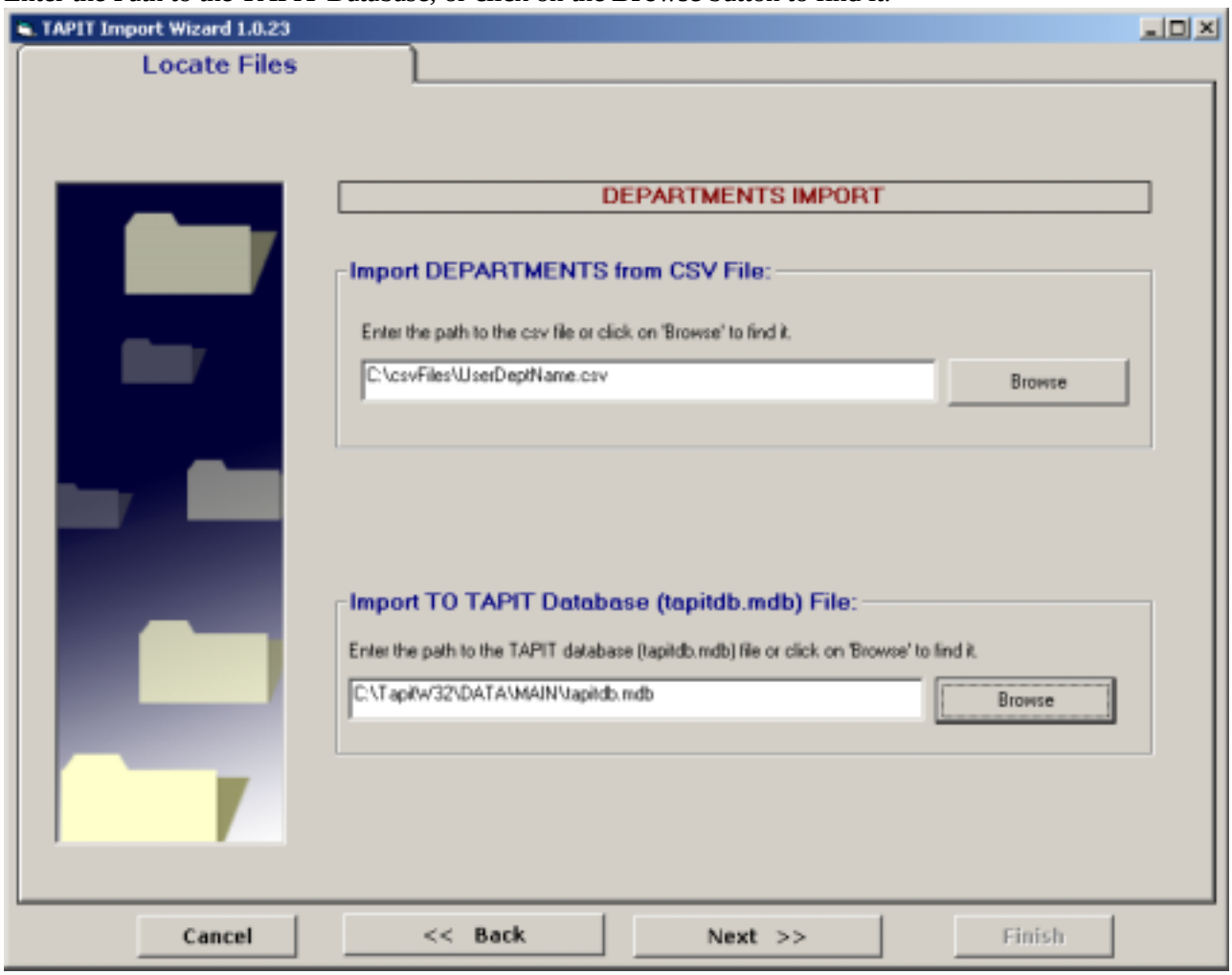
2. Click on **Next**.
   Select Destination Table screen appears.
   Select IMPORT destination TAPIT table: in this example we are importing Users.



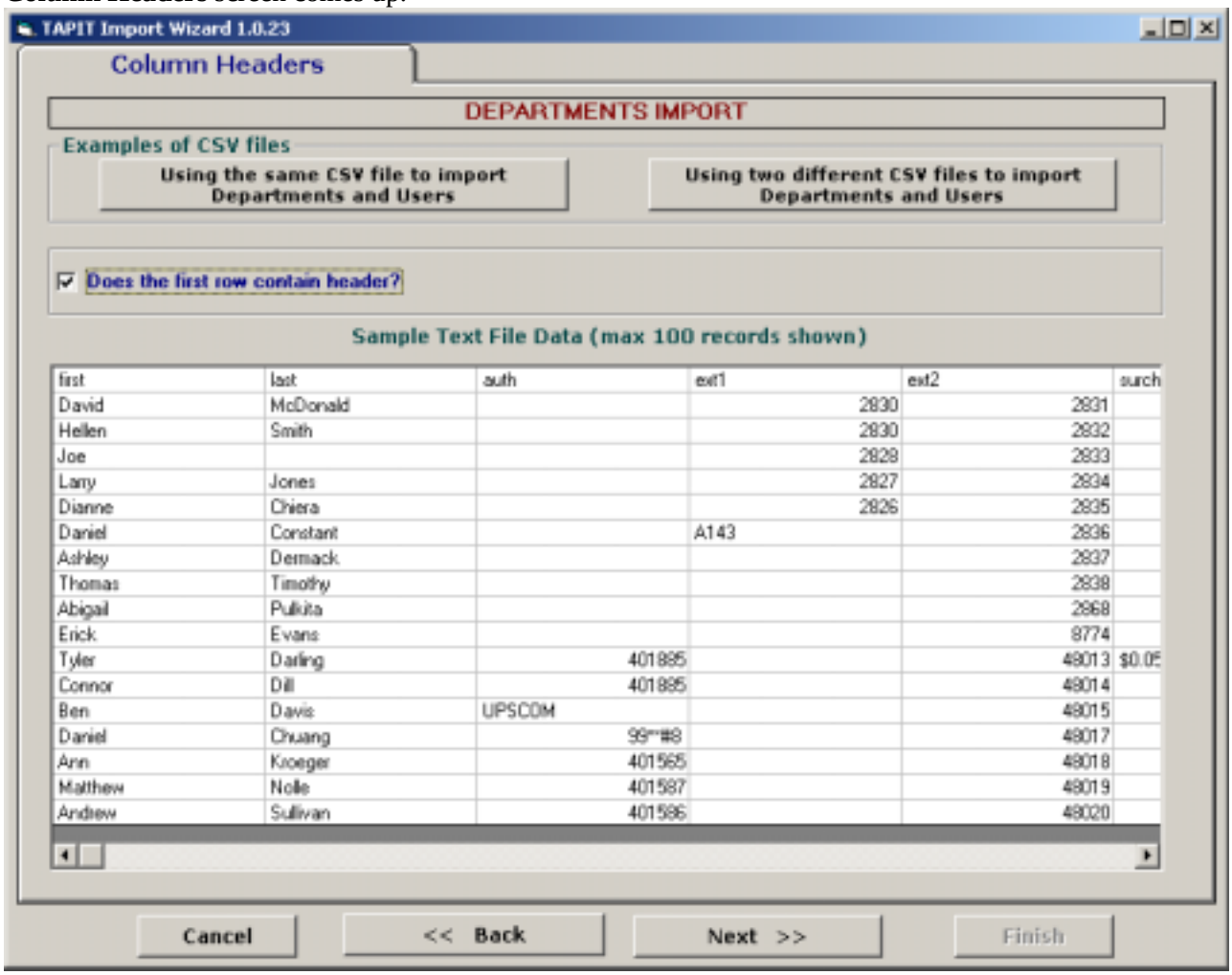
3. The **Import Departments?** screen is displayed. In our case we want to import Departments and associate them with Users. Click on the **YES** option.



4. Click on **Next**.
   Locate Files screen opens.
   This is the first screen of Departments Import. Departments have to be imported prior to Users. When Departments Import is completed this wizard proceeds with Users import.
   Enter the Path to the User\Department CSV file, or click on the **Browse** button to find it.
   Enter the Path to the TAPIT Database, or click on the **Browse** button to find it.



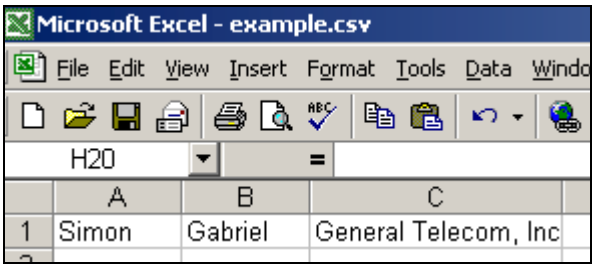
5. Click on **Next**
Column Headers screen comes up.



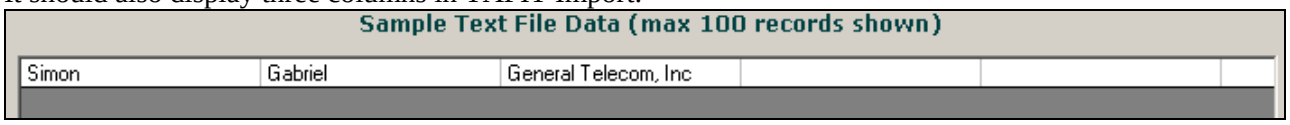
first	last	auth	ext1	ext2	surch
David	McDonald		2830	2831	
Hellen	Smith		2830	2832	
Joe			2828	2833	
Larry	Jones		2827	2834	
Dianne	Chiera		2826	2835	
Daniel	Constant		A143	2836	
Ashley	Dermack			2837	
Thomas	Timothy			2838	
Abigail	Pulkita			2868	
Erick	Evans			8774	
Tyler	Darling	401885		48013	$0.05
Connor	Dill	401885		48014	
Ben	Davis	UPSCOM		48015	
Daniel	Chuang	99**88		48017	
Ann	Kroeger	401565		48018	
Matthew	Nolle	401587		48019	
Andrew	Sullivan	401586		48020	

You can view first 100 lines of your User\Department CSV file for your reference under **Sample Text File Data**.
Please check if the displayed data reflects the User\Department CSV file (if data is separated into columns properly).
Please note:
Each comma is a beginning of a new column in a Comma Separated text file (CSV).
Columns have to be divided by commas (not any other characters).
If commas are a part of a field value they should be enclosed by double quotes
i.e. *"General Telecom, Inc"*.

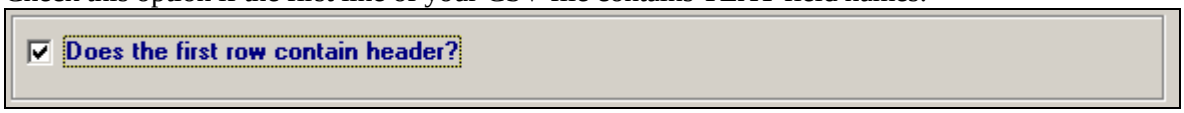
Example:
Our Example.csv file contains following entry:
Simon,Gabriel,"General Telecom, Inc"
This file is displayed in MS Excel in the following format – in three columns.



It should also display three columns in TAPIT Import.

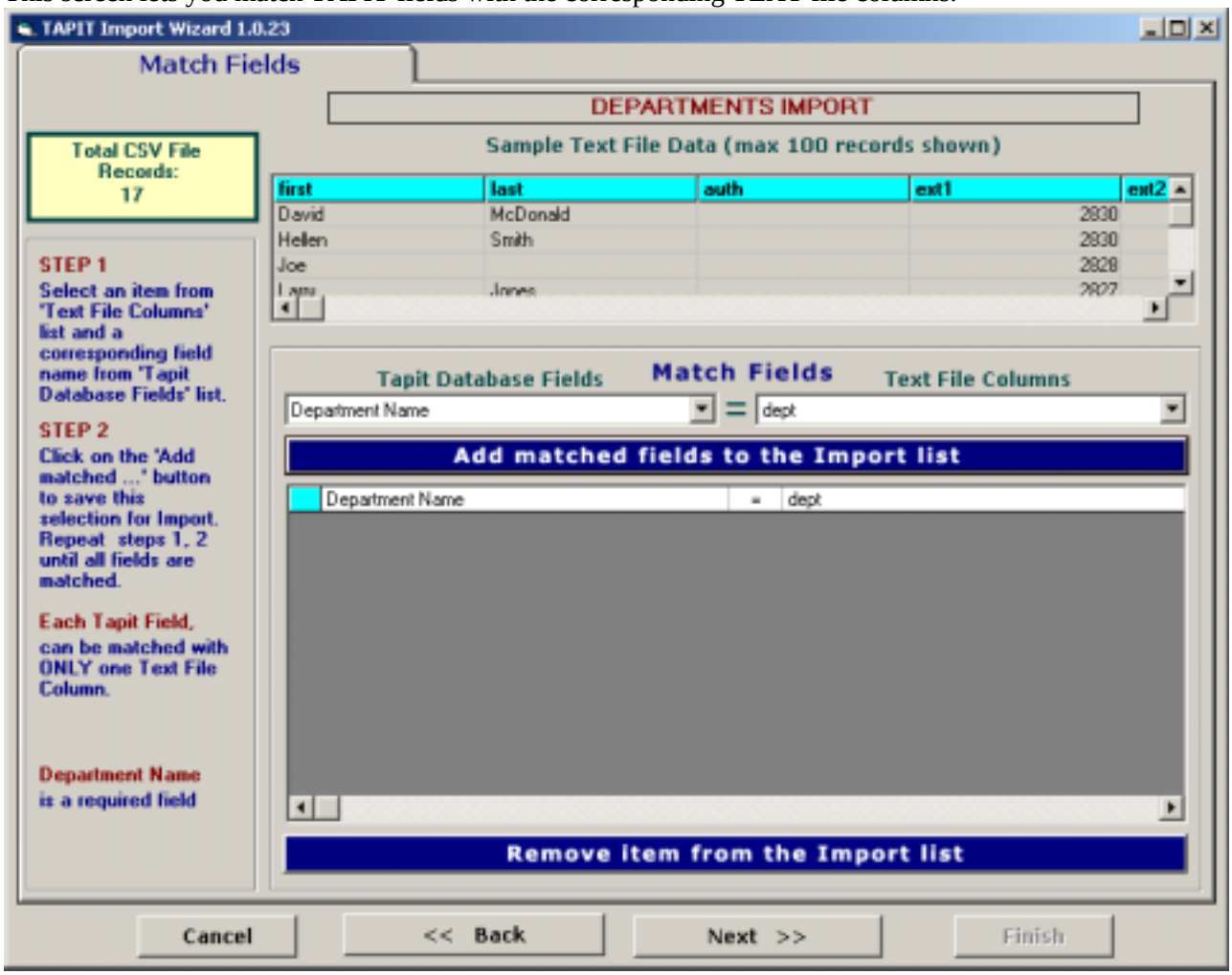


6. **Does the first row contain headers?**
Check this option if the first line of your CSV file contains TEXT field names.



The User\Department CSV, used in our example, contains headers (see **Format of a User\Department CSV file** section above, the example of CSV file, line 1). If your CSV file does not have headers it is recommended to create them. Having column names makes it easier to match TAPIT fields with the Text file columns.

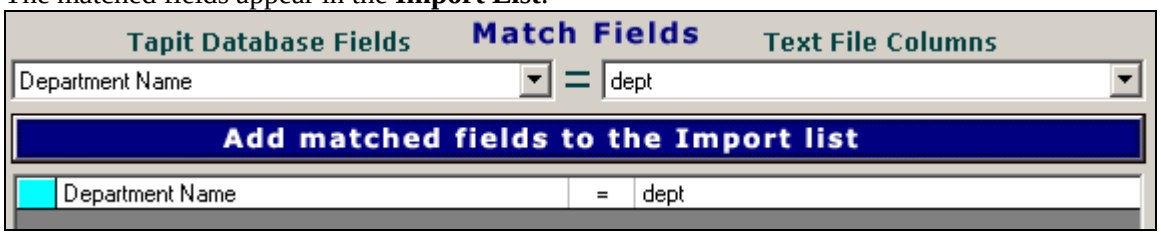
7. Click on **Next**.
   The **Match Fields** screen appears.
   This screen lets you match TAPIT fields with the corresponding TEXT file columns.



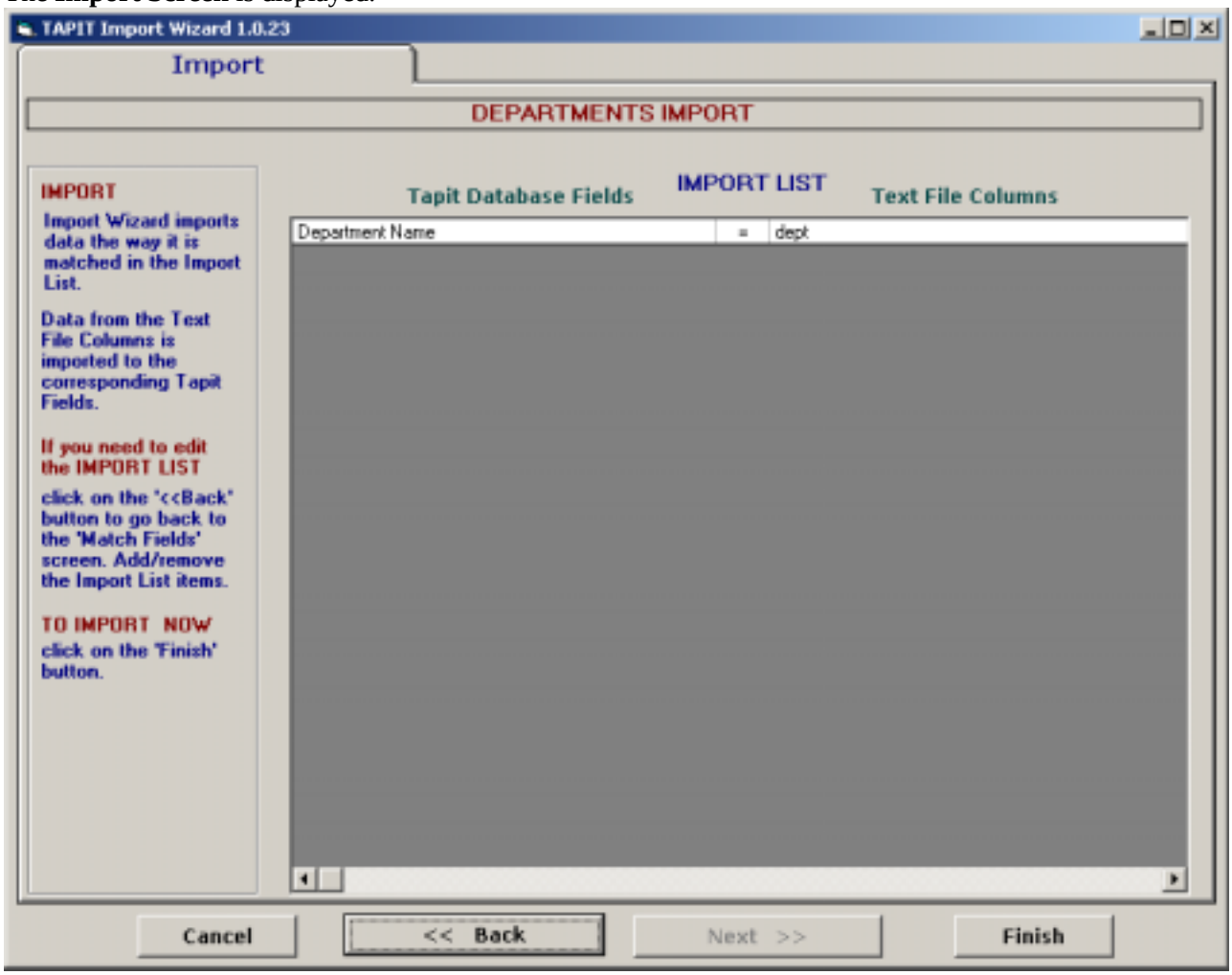
8. Select a TAPIT field from **TAPIT Database Fields** and then a corresponding item from **Text File Columns** list box.

   In our case we only need to match Department Name with a corresponding Text File Column.
9. Click on **Add matched fields to the Import List**.

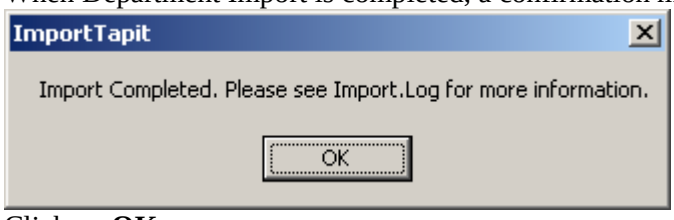
   The matched fields appear in the **Import List**.



10. When all fields are matched, click on **Next**.
    The **Import Screen** is displayed.

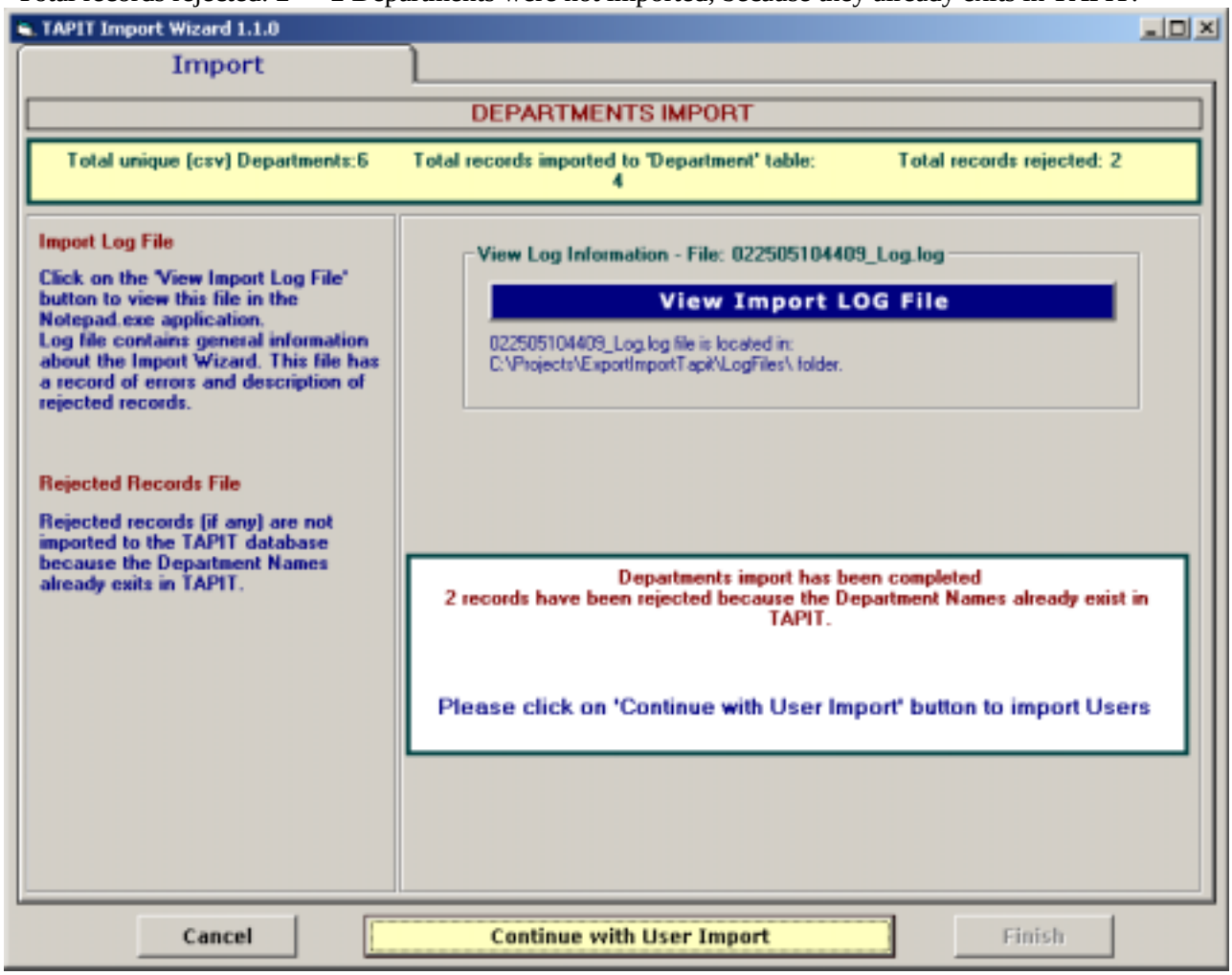


    This screen displays the final field selection for import.
11. Import Wizard imports data the way it is matched in the **Import List**.
    If you need to edit the **Import List**, click on the **Back** button to go back to the **Match Fields** screen.
    Add or **Remove** rows from the **Import List** using the **Add matched fields to Import list** or **Remove item form Import list** buttons.
    Otherwise, click on **Finish** to import.
12. When Department Import is completed, a confirmation message appears.



    Click on **OK**.

13. **Your Department Import is completed**.
    Import screen display changes.
    The top of the screen displays statistics.
    Following our example below:
    ”Total unique (csv) Departments: 6” - there has been 6 unique Department Names found.
    ”Total records imported to ‘Department’ table:”4 – 4 Departments were imported
    ”Total records rejected: 2” – 2 Departments were not imported, because they already exits in TAPIT.



If some **records are rejected** that means they already exist in TAPIT. You don’t need to import them again.
Log file is a text file that contains information on this import. It resides in a subfolder of the folder where TAPIT Import is installed. If default options were accepted when installing TAPIT Import, this file is located in C:\Program Files\TAPIT Import\LogFiles folder. To view log file click on **View Import LOG file**.
The LOG file opens in Notepad.

The log file produced by our example import:

==========DEPARTMENTS IMPORT==========

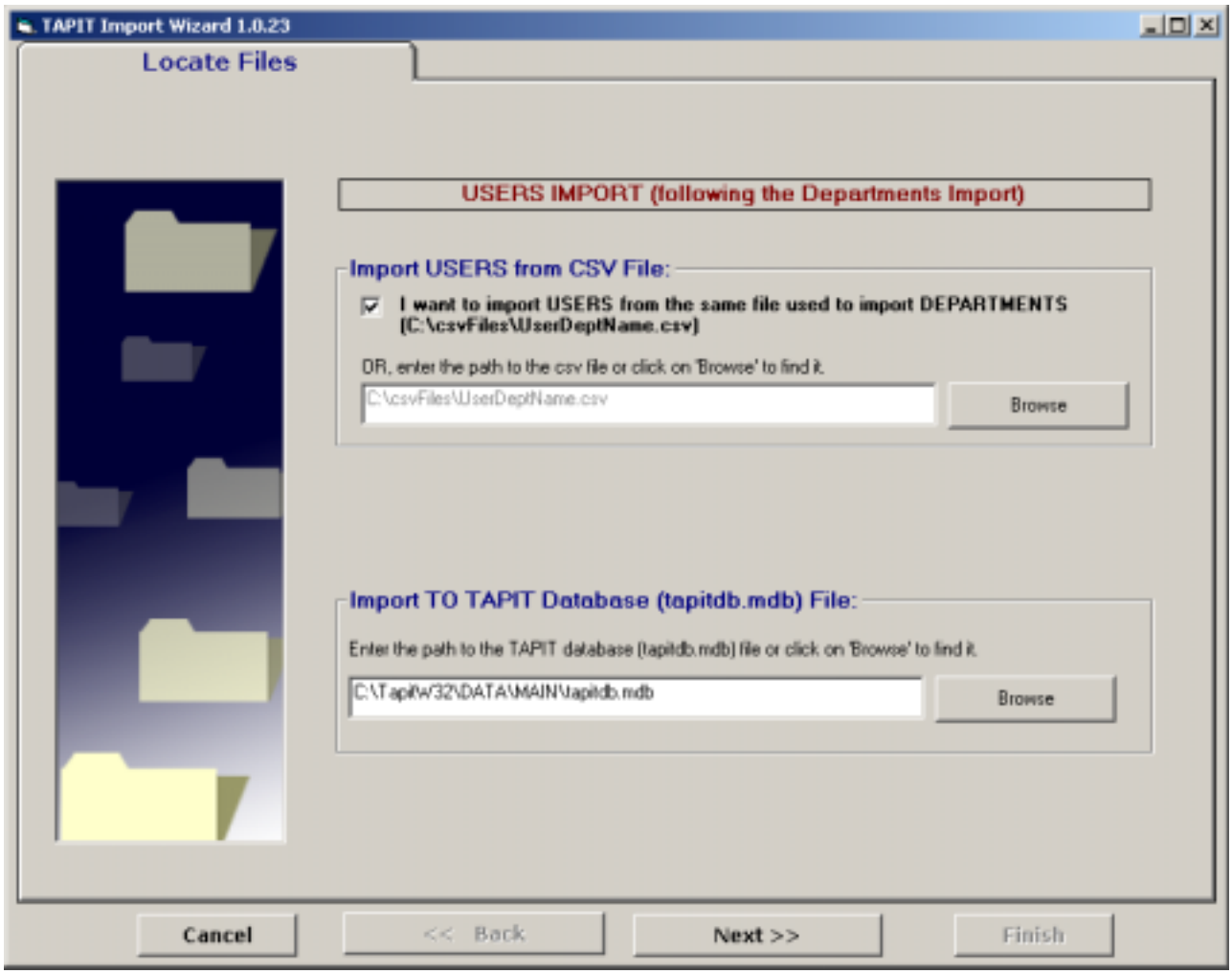
Import FROM CSV file C:\csvFiles\UserDeptName.csv
Import TO the C:\TAPITW32\DATA\MAIN\TAPITDB.MDB database, Department table
**********02/25/05 11:44**********
****
FIELDS ARE MATCHED THE FOLLOWING WAY:

Department Name = dept (Field8 DeptName)

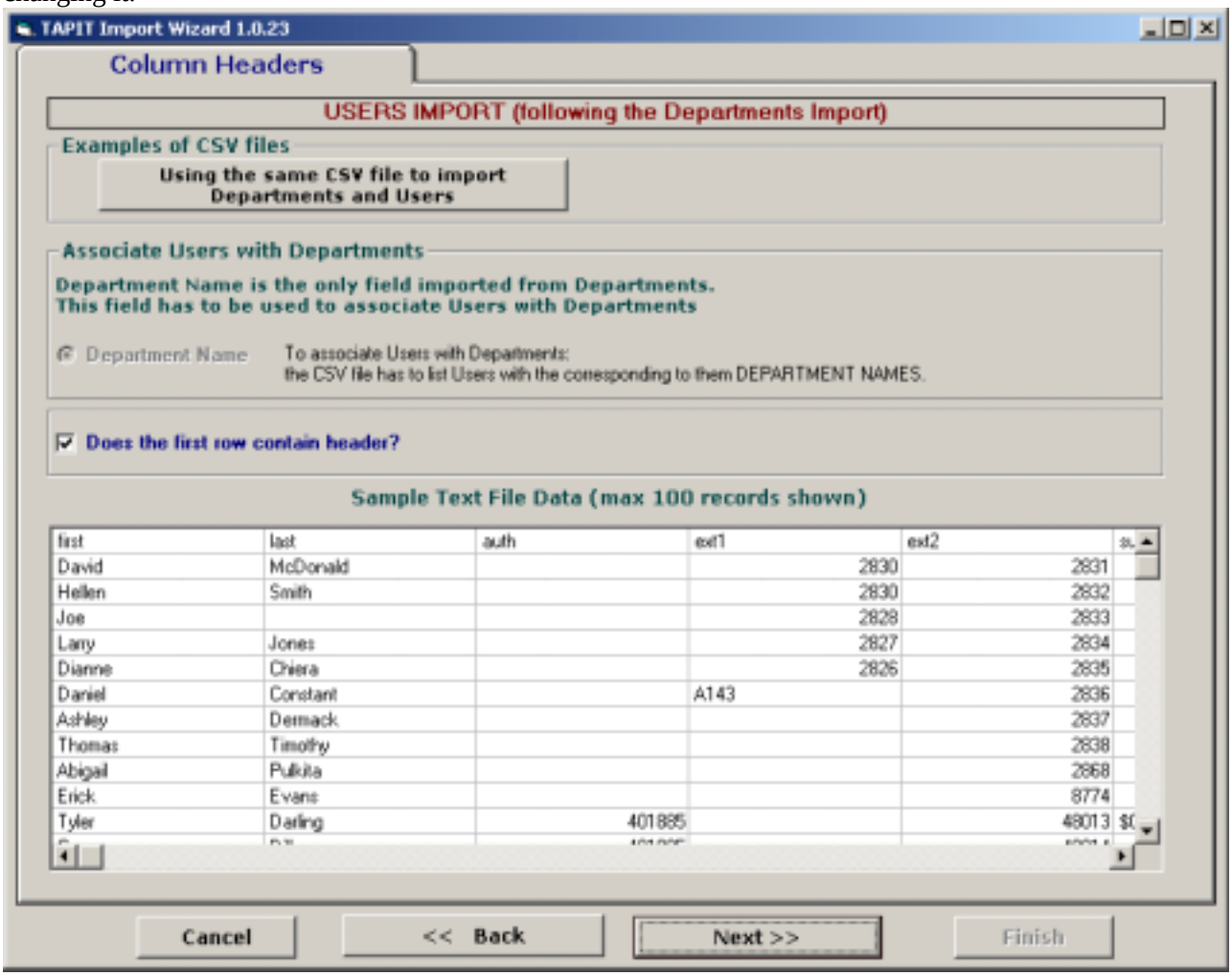
****

Rejected rec # 1dept: "ACCOUNTING " already exists in a database and has not been saved in TAPIT
Rejected rec # 2dept: "Customer Service" already exists in a database and has not been saved in TAPIT
**********02/25/05 11:44**********
Import to the Department table from file C:\csvFiles\UserDeptName.csv is completed
(Import statistics)
17 total CSV file records.
6 unique Department Names to import.
4 imported records.
2 rejected records.
****

14. You can proceed with User Import.
    Click on the **Continue with User Import** button.
    Locate Files screen appears. This screen lets you select a different file to import Users. However, in our import example we are importing Departments and Users from the same file.
    Click on **I want to import USERS from the same file...** box to check it. The path to the User\Department CSV file appears.
    The path to the TAPIT Database is saved from the Department Import and should not be changed.

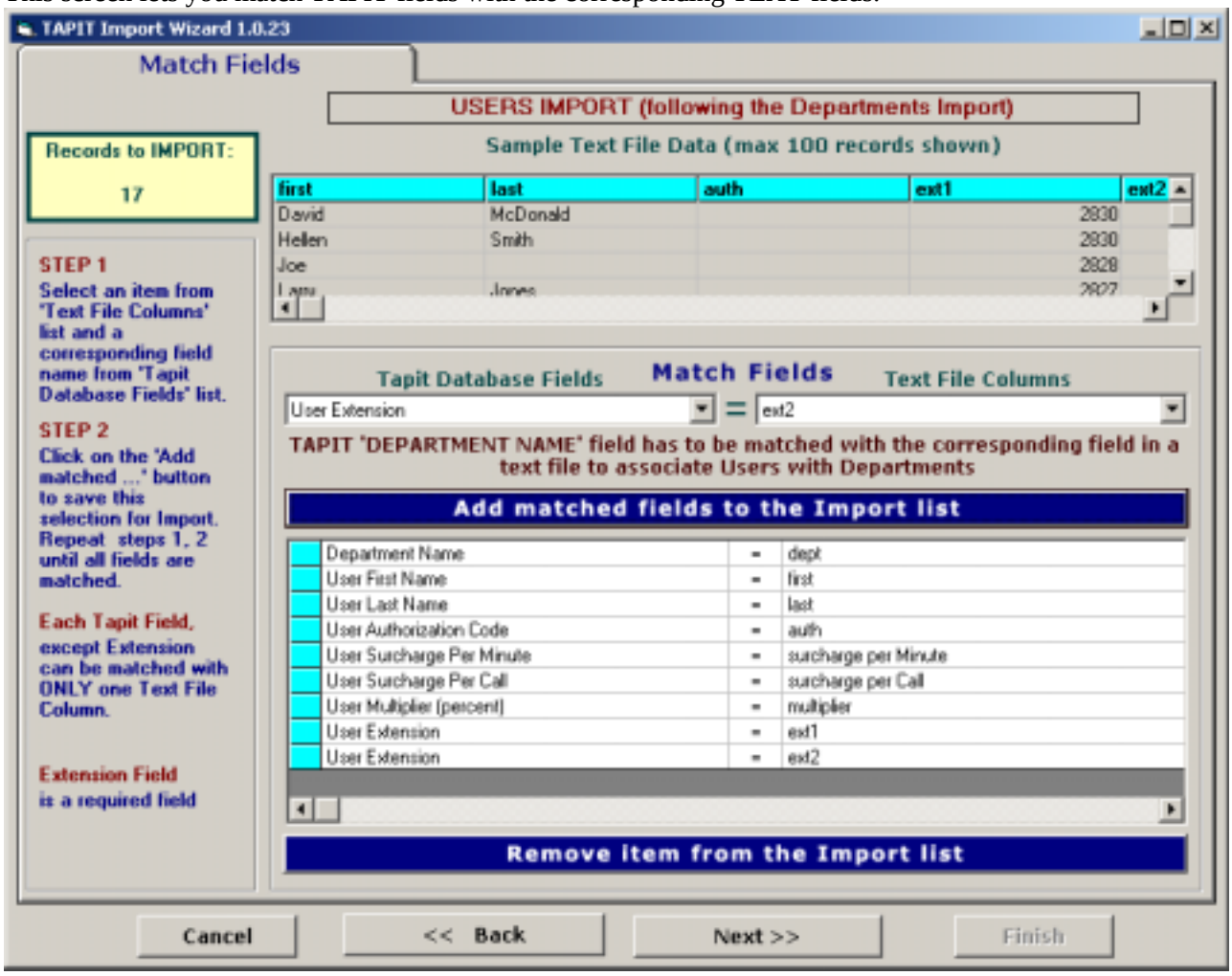


15. Click on **Next.**
    Column Headers screen comes up.
    This screen is different from what you have seen when importing Departments.
    Associate Users with Departments part has been added. Since we've imported only Department Names, Department Name is the only filed that can be used to assign Users to Departments. That is why there is only one option displayed, **Department Name,** and this option is grayed to prevent a user from changing it.



16. Since we are using the same CSV file and the Wizard already knows that it contains headers the **Does the first row contain header?** box is checked.

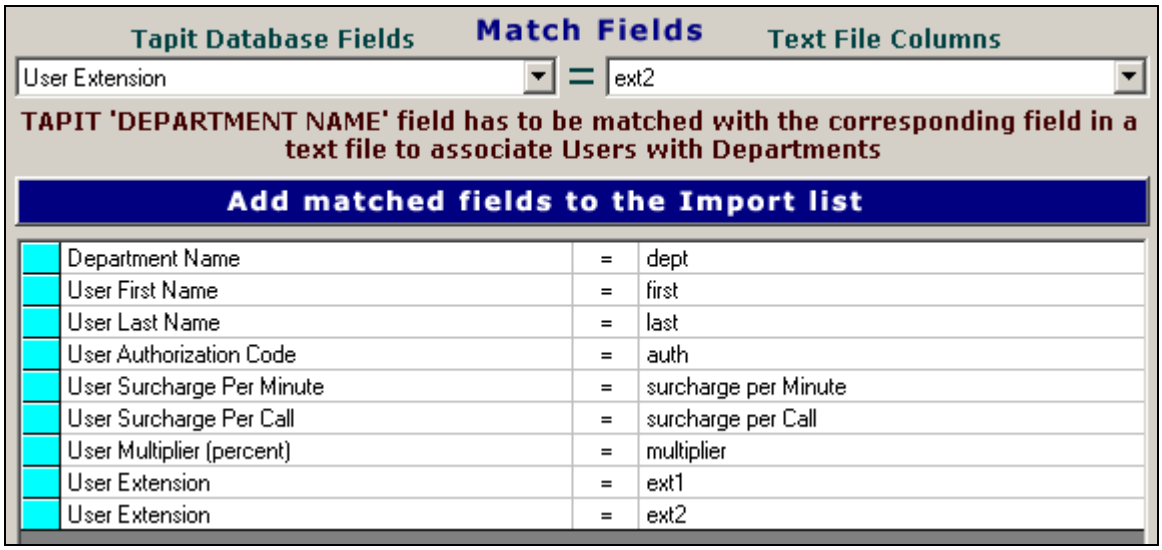
17. Click on **Next**.
    The **Match Fields** screen appears.
    This screen lets you match TAPIT fields with the corresponding TEXT fields.



18. Select a TAPIT field from **TAPIT Database Fields** and then a corresponding item from **Text File Columns** list box.

19. Click on **Add matched fields to the Import List**.

    The matched fields appear on the **Import List**.



WHEN MATCHING USER FIELDS

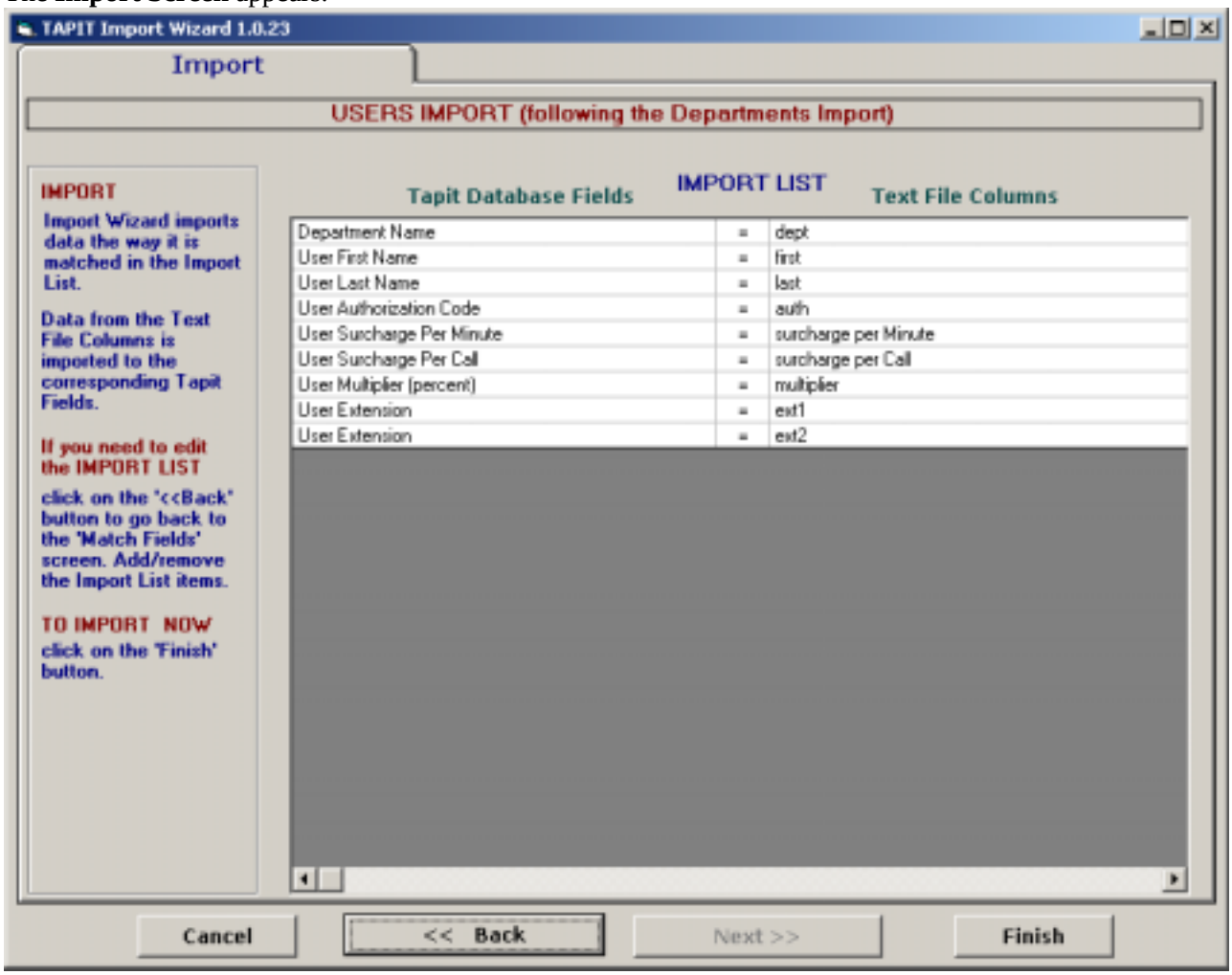
The field associating Users with Departments has to be matched. In our case it is the Department Name field.

User Last Name has to be included in the **Import List**. This TEXT field (column) cannot be empty.

TAPIT **User Extension** is the only field that can be matched with multiple TEXT fields (columns). User can have multiple extensions.

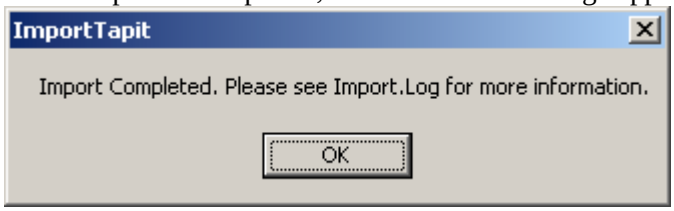
All other TAPIT fields can be matched with only one TEXT field (column).

20. When all fields are matched, click on **Next**.
    The **Import Screen** appears.



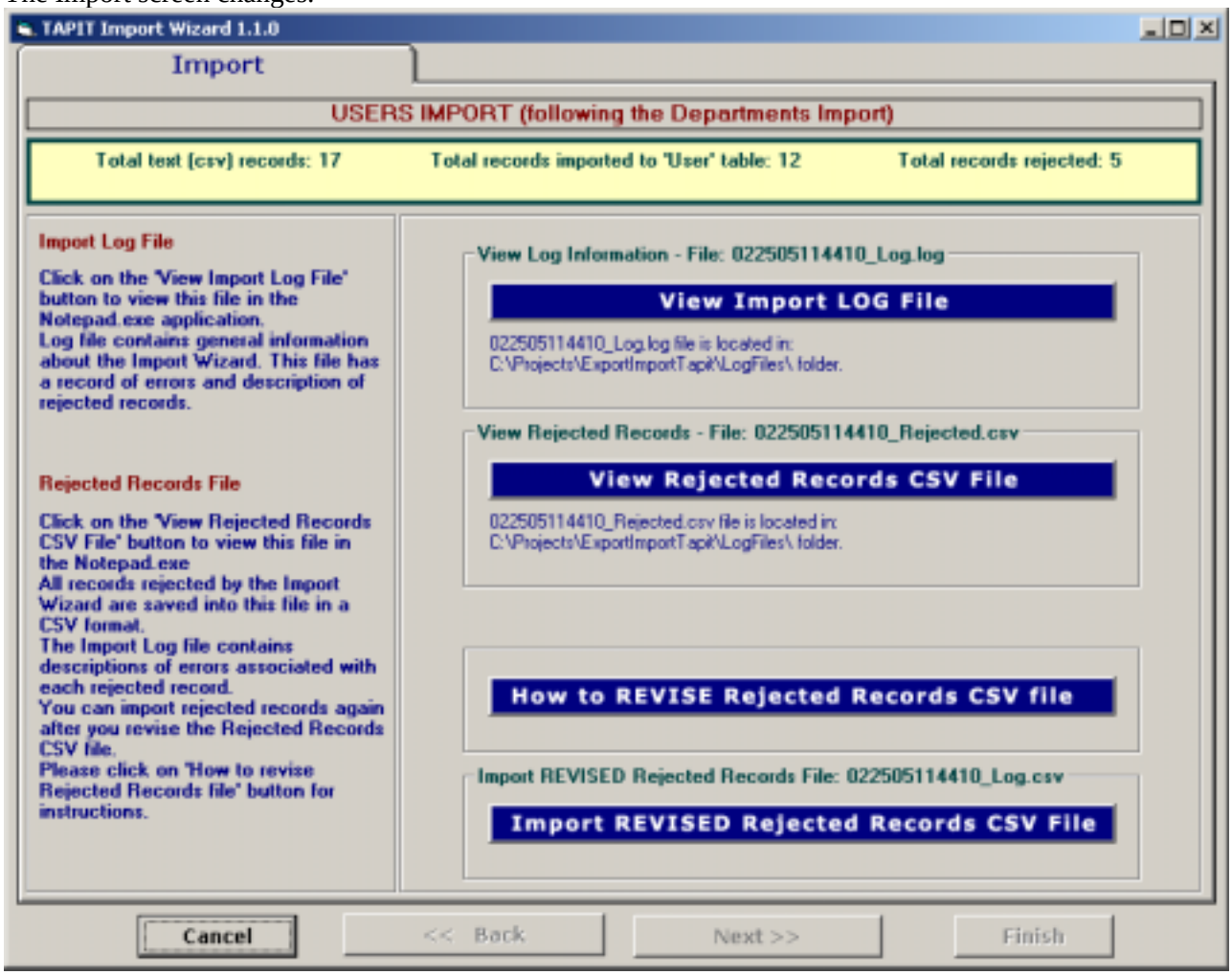
    This screen displays the final field selection for import.
    TAPIT Import Wizard imports data the way it is matched in the **Import List**.
    If you need to edit the **Import List**, click on the **Back** button to go back to the **Match Fields** screen.
    Add or **Remove** rows from the **Import List** using the **Add matched fields to Import list** or **Remove item form Import list** buttons.
    Otherwise, click on **Finish** to import.

21. When import is completed, a confirmation message appears.



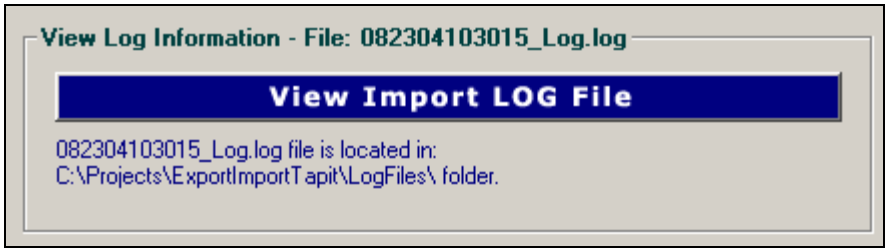
    Click on **OK**.

22. The Import screen changes.



Top of the Import screen displays Import statistics.
Following example below – the CSV file contained 17 total TEXT records, 12 TEXT records were successfully saved (imported) into the TAPIT Database. 5 TEXT records were rejected (were not imported).

23. To find out more about rejected records click on the **View Import Log File** button.



The log file contains two parts: the Department part and the Users part.

Scroll down to see the Users Import part.

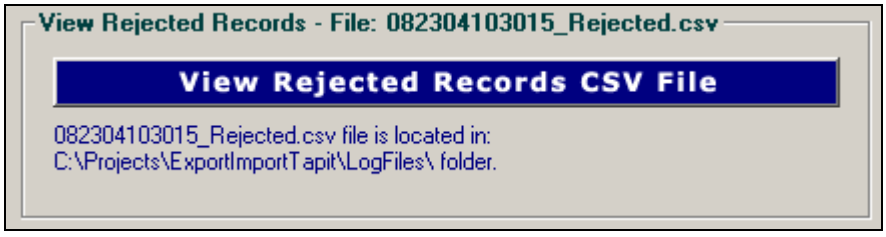
==========**USERS IMPORT**==========

Import FROM CSV file C:\csvFiles\UserDeptName.csv
Import TO the C:\TAPITW32\DATA\MAIN\TAPITDB.MDB database, User table
**********02/25/05 11:49**********
****
FIELDS ARE MATCHED THE FOLLOWING WAY:
Department Name = dept (Field8 DeptName)
User First Name = first (Field0 UserFirstName)
User Last Name = last (Field1 UserLastName)
User Authorization Code = auth (Field2 UserAuthCode)
User Surcharge Per Minute = surcharge per Minute (Field5 UserSurchargePerMinute)
User Surcharge Per Call = surcharge per Call (Field6 UserCallSurcharge)
User Multiplier (percent) = multiplier (Field7 UserMultiplier)
User Extension = ext1 (Field3 Extension)
User Extension = ext2 (Field4 Extension)
****

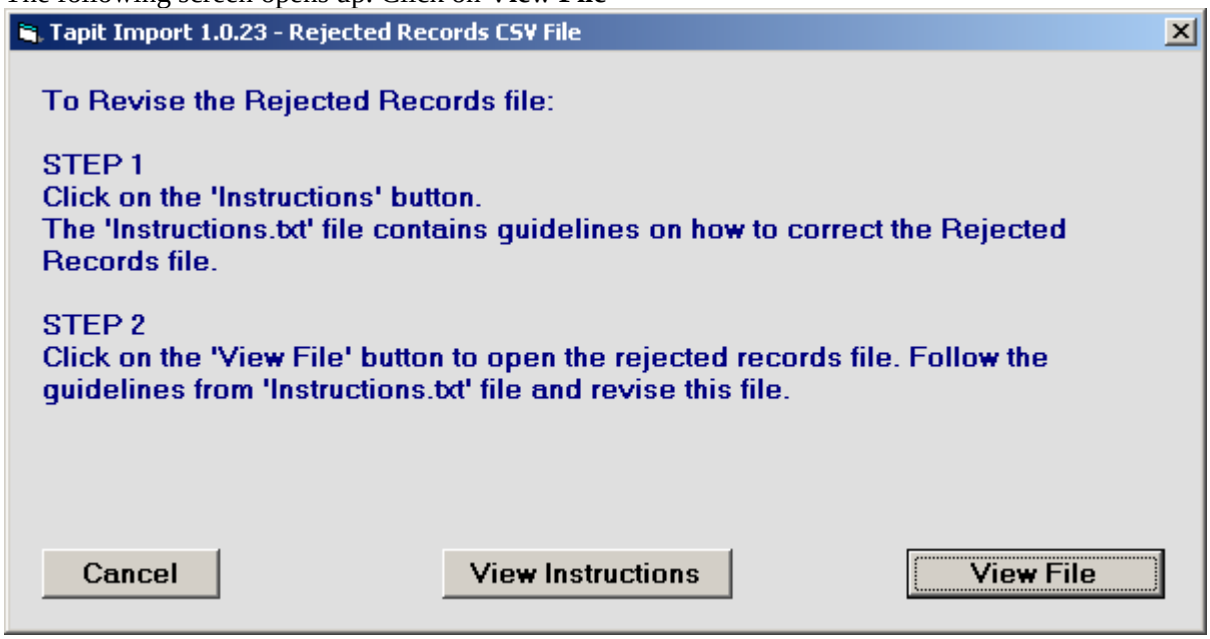
(why records were rejected
rec # matches the record number in a rejected file csv)
Rejected rec # 1Extension: "2830" already exists in a database and has not been saved in TAPIT
Rejected rec # 2last is empty. This a required field in User table and cannot be left empty.
Rejected rec # 3Extension: "A143" contains illegal characters. Only digits are allowed. and has not been saved in TAPIT
Rejected rec # 4auth: "401885" already exists in TAPIT database, User table
Rejected rec # 5auth: "99**#8 " contains illegal characters. It can only contain digits and letters.
**********02/25/05 11:49**********

(Import statistics)
Import to the User table from file C:\csvFiles\UserDeptName.csv is completed
17 total CSV file records.
12 imported records.
5 rejected records.
****

24. To view rejected records click on the **View Rejected Records CSV File** button



25. The following screen opens up. Click on **View File**



The Rejected Records csv file opens in Notepad. The below is the Rejected Records file produced by our example import (how it is displayed in Notepad).
The entries in bold are the entries to be corrected – the log file above has a list of these entries and information on what needs to be corrected.
The first row of our rejected file is the headers. The Rejected Records file headers reflect headers used originally in our CSV import file.

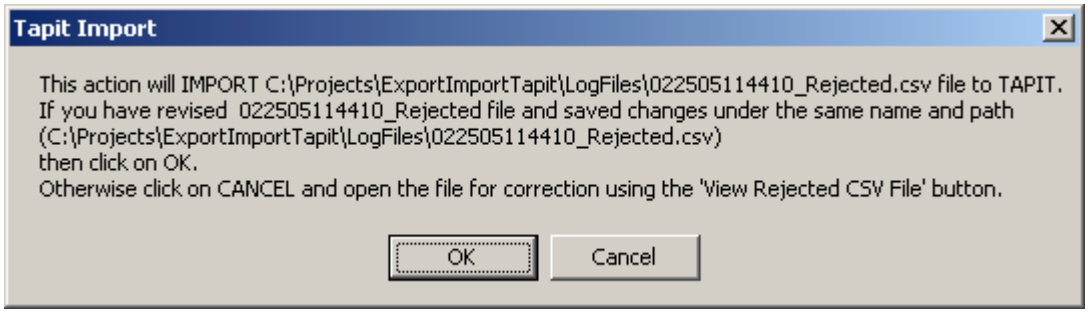
"Rec Number","last","dept","first","surcharge per Minute","surcharge per Call","multiplier","auth","ext1","ext2"
"1","Smith","ACCOUNTING ","Hellen","0.2","","","","","**2830**","2832"
"2","","IT","Joe","","","","","","2828","2833"
"3","Constant","Human Resources","Daniel","","","","","","**A143**","2836"
"4","Dill","Sales","Connor","","","","","**401885**","","48014"
"5","Chuang","Sales","Daniel","","","","","**99**#8** ","","48017"

The same Rejected Records file after corrections:
"Rec Number","last","dept","first","surcharge per Minute","surcharge per Call","multiplier","auth","ext1","ext2"
"1","Smith","ACCOUNTING ","Hellen","0.2","","","","","**2855**","2832"
"2","**Brown**","IT","Joe","","","","","","2828","2833"
"3","Constant","Human Resources","Daniel","","","","","","**4143**","2836"
"4","Dill","Sales","Connor","","","","","**401995**","","48014"
"5","Chuang","Sales","Daniel","","","","","**41998**","","48017"

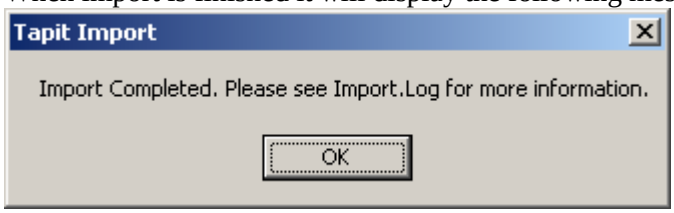
The Rejected Records file needs to be saved in Notepad under the same name.

26. Now you can import rejected records again by clicking on **Import Revised Rejected Records CSV File**.

27. If you have corrected the Rejected Records file and saved under the same name (overwritten) then click on **OK** to continue.

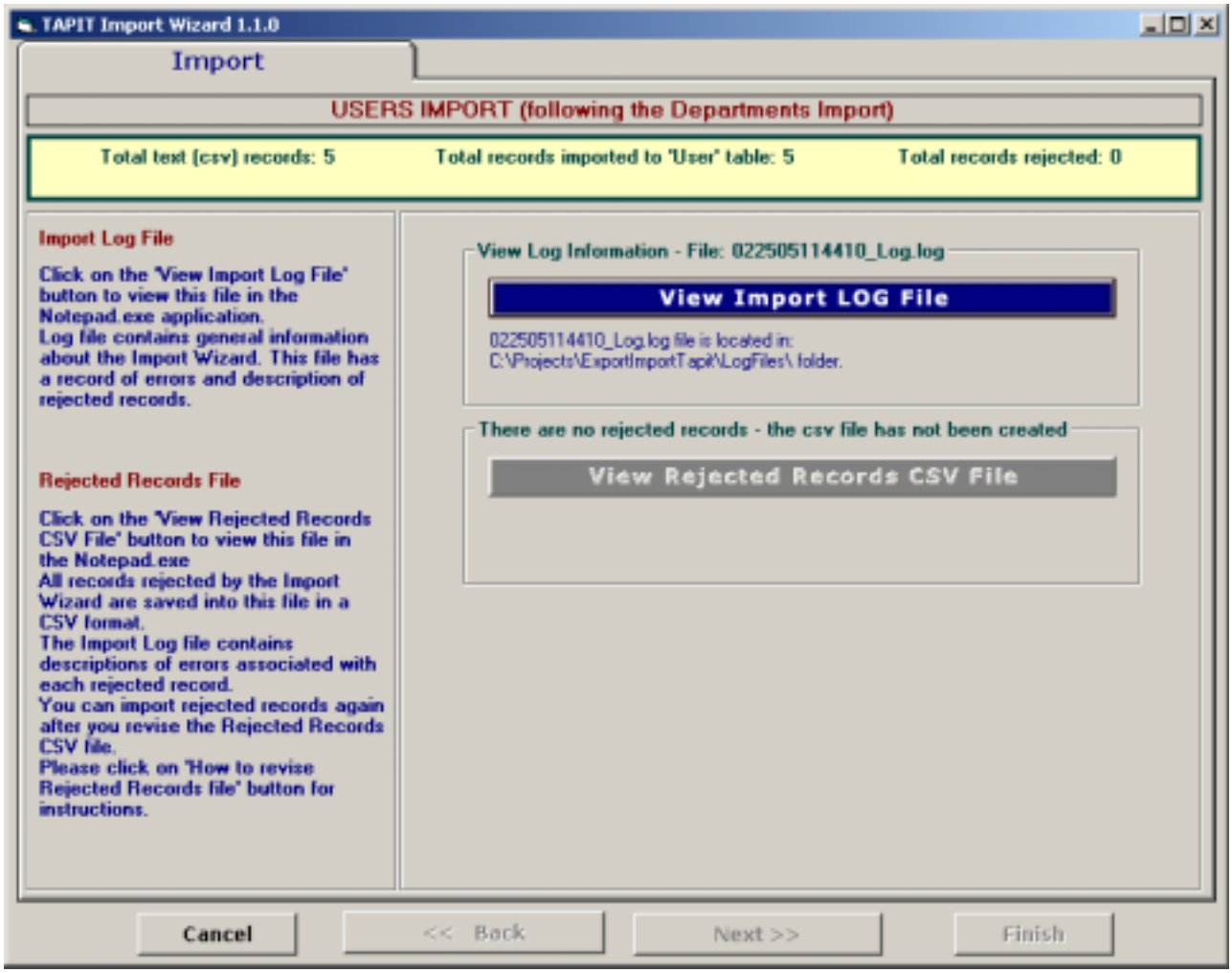


28. TAPIT Import Wizard will import records from the Rejected Records file.
When import is finished it will display the following message:

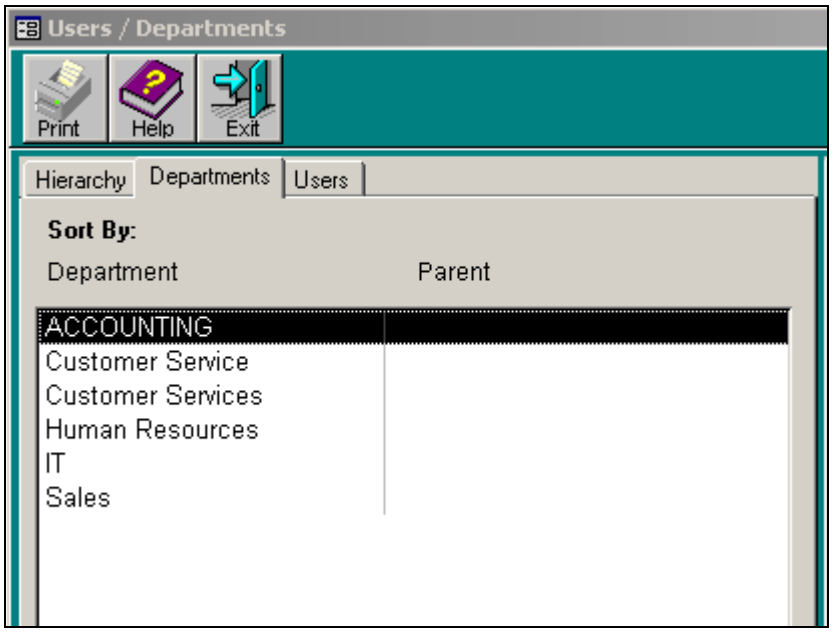


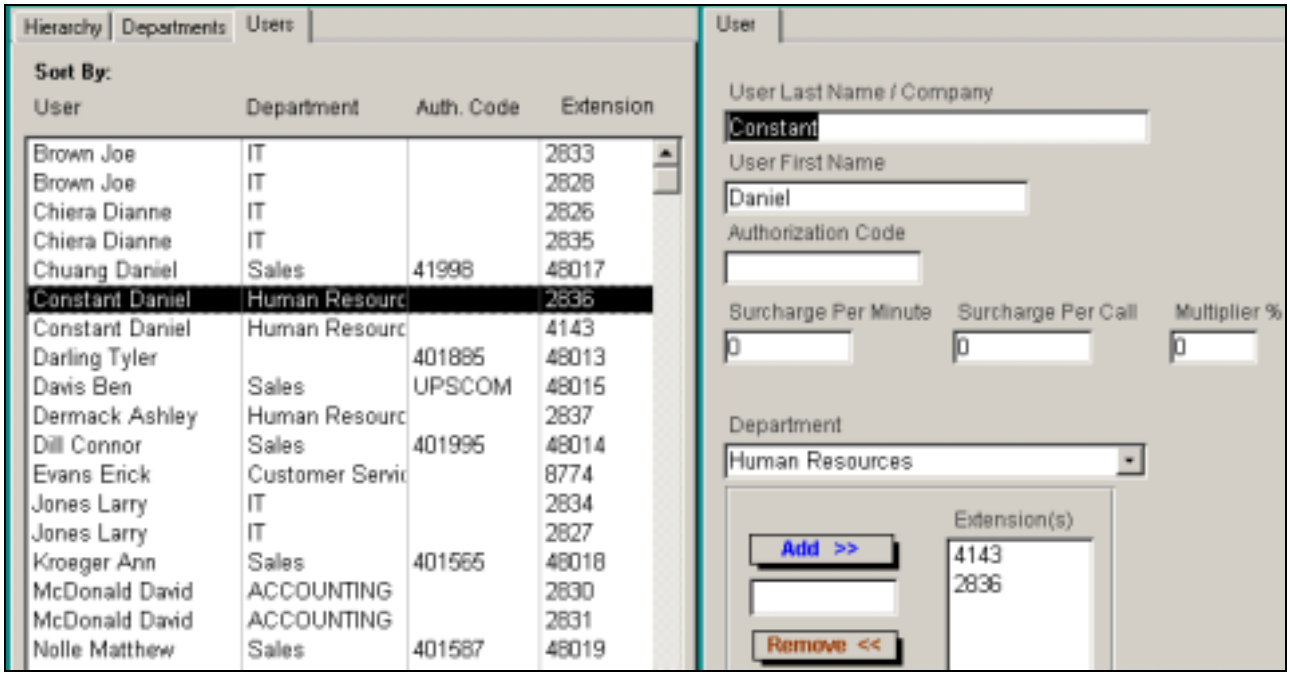
Click on **OK**.

29. The Import screen changes to reflect the new import results (import from Rejected Records csv file).
    In our example:
    ”Total text (csv) records: 5” – total number of text records in the Rejected Records csv file.
    ”Total records imported to ‘User’ table:”5 – the number of text records from the Rejected Records csv file imported to TAPIT.
    ”Total records rejected: 0” – the number of rejected records. This number should be 0 if all of the problems have been corrected in the Rejected Records csv file.



    Your import is completed.
30. You can go to TAPIT and view **Users/Departments** screen.
    NOTE:
    In our example one of the Users records had a typo in the Department Name. Instead of Customer Service it was spelled Customer Service**s**.
    To demonstrate how such error can impact import results we did not correct it.
    As a result we have imported two departments Customer Service and Customer Services instead of one.


Users / Departments
Print
Help
Exit
Hierarchy
Departments
Users
Sort By:
Department
Parent
ACCOUNTING
Customer Service
Customer Services
Human Resources
IT
Sales


Hierarchy
Departments
Users
Sort By:
User
Department
Auth. Code
Extension
Brown Joe IT 2833
Brown Joe IT 2828
Chiera Dianne IT 2826
Chiera Dianne IT 2835
Chuang Daniel Sales 41998 48017
Constant Daniel Human Resourc 2836
Constant Daniel Human Resourc 4143
Darling Tyler 401885 48013
Davis Ben Sales UPSCOM 48015
Dermack Ashley Human Resourc 2837
Dill Connor Sales 401995 48014
Evans Erick Customer Servi 8774
Jones Larry IT 2834
Jones Larry IT 2827
Kroeger Ann Sales 401565 48018
McDonald David ACCOUNTING 2830
McDonald David ACCOUNTING 2831
Nolle Matthew Sales 401587 48019
User
User Last Name / Company
Constant
User First Name
Daniel
Authorization Code
Surcharge Per Minute
Surcharge Per Call
Multiplier %
0
0
0
Department
Human Resources
Extension(s)
Add >>
Remove <<
4143
2836

Using different csv files to import Users and Departments

You have two csv files: User csv file and Department csv file.

CASE 1 - Users are associated with Departments via Department Names

User csv file contains **User information** as well as lists **Department Names** (and optionally Department Ids) for the corresponding Users.

Microsoft Excel - UserDeptIdName.csv

File Edit View Insert Format Tools Data Window Help

K27

	A	B	C	D	E	F	G
1	first	last	auth	ext1	ext2	dept	dept no.
2	David	Brady		2830	2831	ACCOUNTING	1
3	Hellen	Smith		2829	2832	ACCOUNTING	1
4	Joe	McDonald		2828	2833	IT	2
5	Larry	Jones		2827	2834	IT	2
6	Dianne	Chiera		2830	2835	IT	2
7	Daniel	Constant			2836	Human Resources	3
8	Ashley	Dermack			2837	Human Resources	3
9	Thomas	Timothy			2838	Customer Service	4
10	Abigail	Pulkita			2868	Customer Service	4
11	Erick	Evans			8774	Customer Service	4
12	Tyler	Darling	401885		48013		
13	Connor	Dill	403489		48014	Sales	5
14	Ben	Davis	404852		48015	Sales	5
15	Daniel	Chuang	401268		48017	Sales	5
16	Ann	Kroeger	401565		48018	Sales	5
17	Matthew	Nolle	401587		48019	Sales	5
18	Andrew	Sullivan	401586		48020	Sales	5

Department csv file contains a list of all the departments – **Department Names** (and optionally Department Ids).

Microsoft Excel - DeptIdName.csv

File Edit View Insert Format Tools

E11

	A	B
1	dept	dept no.
2	ACCOUNTING	1
3	IT	2
4	Human Resources	3
5	Customer Service	4
6	Sales	5

If User csv file contains all Department Names that you want to import (as displayed in our example screens above) you can use the same file to import both Users and Departments (see section **Using the same csv file to import Users and Departments** above).

However, if your Department csv file contains more departments than listed throughout the User csv file

(see the example screen below) then you need to follow directions in this section.

Microsoft Excel - DeptIdName.csv

File Edit View Insert Format Tool

I14 =

	A	B
1	dept	dept no.
2	ACCOUNTING	1
3	IT	2
4	Human Resources	3
5	Customer Service	4
6	Sales	5
7	Marketing	6

This Department csv file lists Marketing as a Department Name. Marketing department is not found in the User csv file. If you want to import Marketing then you have to use both files to import Users and Departments.

CASE 1 - Users are associated with Departments via Department Ids

User csv file contains **User information** as well as lists **Department Ids** (the Ids are not accompanied by Department Names) for the corresponding Users.

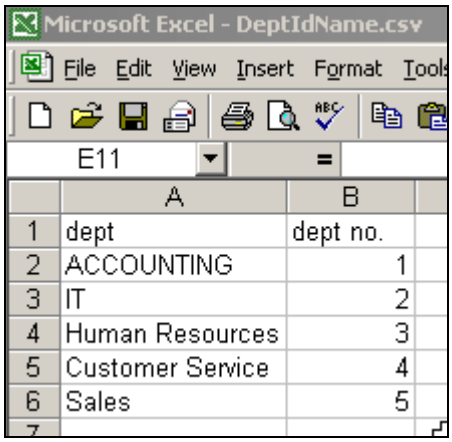
Microsoft Excel - UserDeptId.csv

File Edit View Insert Format Tools Data Window Help

H7 =

	A	B	C	D	E	F
1	first	last	auth	ext1	ext2	dept no.
2	David	Brady		2830	2831	1
3	Hellen	Smith		2829	2832	1
4	Joe	McDonald		2828	2833	2
5	Larry	Jones		2827	2834	2
6	Dianne	Chiera		2830	2835	2
7	Daniel	Constant			2836	3
8	Ashley	Dermack			2837	3
9	Thomas	Timothy			2838	4
10	Abigail	Pulkita			2868	4
11	Erick	Evans			8774	4
12	Tyler	Darling	401885		48013	
13	Connor	Dill	403489		48014	5
14	Ben	Davis	404852		48015	5
15	Daniel	Chuang	401268		48017	5
16	Ann	Kroeger	401565		48018	5
17	Matthew	Nolle	401587		48019	5
18	Andrew	Sullivan	401586		48020	5

Department csv file contains a list of all the departments – **Department Names** and **Department Ids** (both are required in this case).


Microsoft Excel - DeptIdName.csv

File Edit View Insert Format Tools

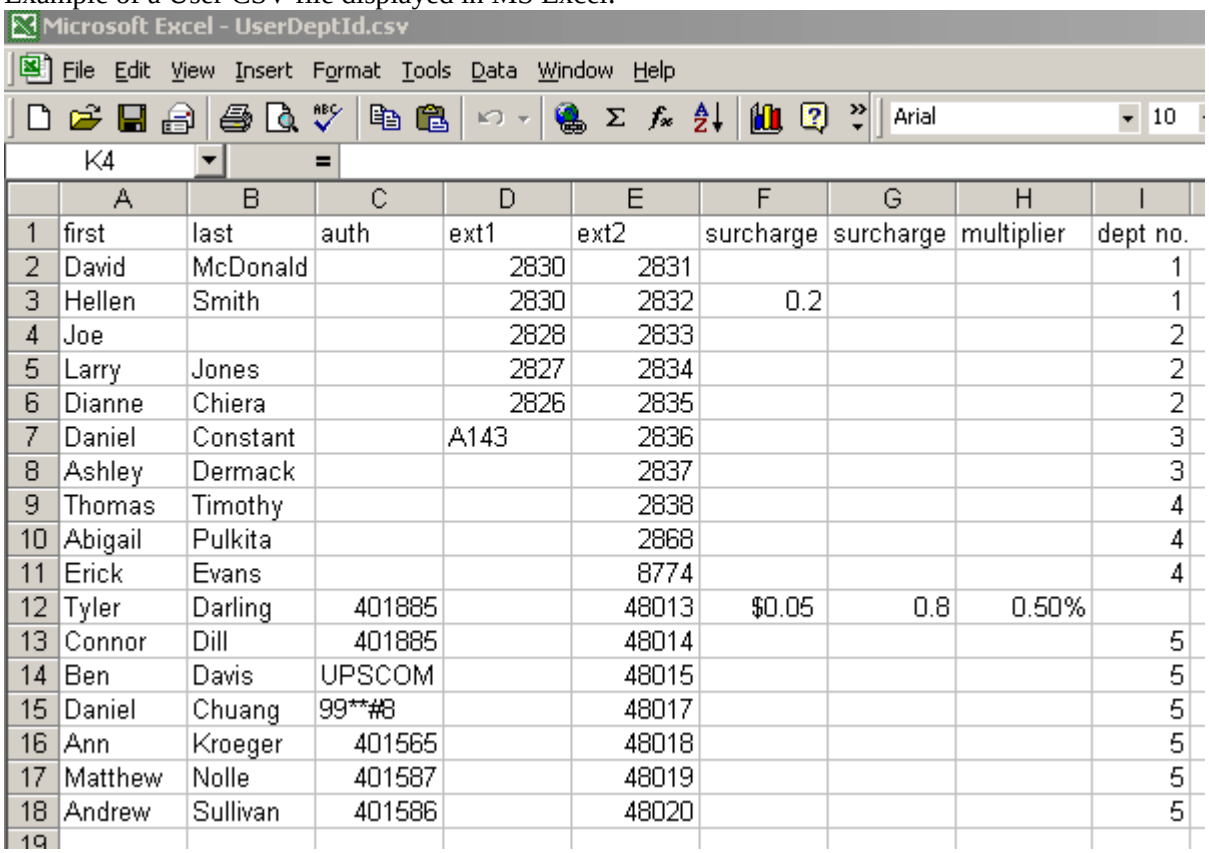
E11 =

	A	B
1	dept	dept no.
2	ACCOUNTING	1
3	IT	2
4	Human Resources	3
5	Customer Service	4
6	Sales	5

If this description matches your csv files, then please follow import directions from this section.

Format of a User CSV file

Example of a User CSV file displayed in MS Excel:


Microsoft Excel - UserDeptId.csv

File Edit View Insert Format Tools Data Window Help

Arial 10

K4 =

	A	B	C	D	E	F	G	H	I
1	first	last	auth	ext1	ext2	surcharge	surcharge	multiplier	dept no.
2	David	McDonald		2830	2831				1
3	Hellen	Smith		2830	2832	0.2			1
4	Joe			2828	2833				2
5	Larry	Jones		2827	2834				2
6	Dianne	Chiera		2826	2835				2
7	Daniel	Constant		A143	2836				3
8	Ashley	Dermack			2837				3
9	Thomas	Timothy			2838				4
10	Abigail	Pulkita			2868				4
11	Erick	Evans			8774				4
12	Tyler	Darling	401885		48013	$0.05	0.8	0.50%	
13	Connor	Dill	401885		48014				5
14	Ben	Davis	UPSCOM		48015				5
15	Daniel	Chuang	99**#8		48017				5
16	Ann	Kroeger	401565		48018				5
17	Matthew	Nolle	401587		48019				5
18	Andrew	Sullivan	401586		48020				5

Line No.	Is it going to be imported to TAPIT?	Why is the User record rejected?
Line 1	NO	This is the header line. TAPIT Import Wizard prompts to indicate if the CSV file contains headers. If the indicator is set properly this line will not be imported to TAPIT.

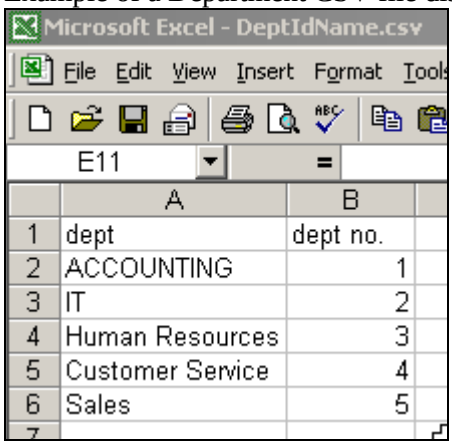
Line 2	YES	
Line 3	NO	The Extension field does not accept any duplicates. Extension 2830 already exists in TAPIT because this extension has already been used for user on line 2 and line 2 has already been imported.
Line 4	NO	The required USER filed Last Name is left blank.
Lines 5-6	YES	
Line 7	NO	The Extension TAPIT field accepts only digits. The A143 is not a correct format because it contains a letter.
Lines 8-13	YES	
Line 14	NO	The Authorization Code TAPIT filed does not accept any duplicates. Authorization Code 401885 already exists in TAPIT because this code has already been used for user on line 13 and line 13 has already been imported.
Line 15	NO	The Authorization Code TAPIT field accepts only digits and letters. The 99**#8 is not a correct format because it contains other characters (*#).
Lines 16-18	YES	

NOTE:

- If a user has **multiple extensions** they need to be listed on the same line with this user (as shown above lines 2 through 5).
- **Line 12** – User Tyler Darling is not assigned to any department.

Format of a Department CSV file

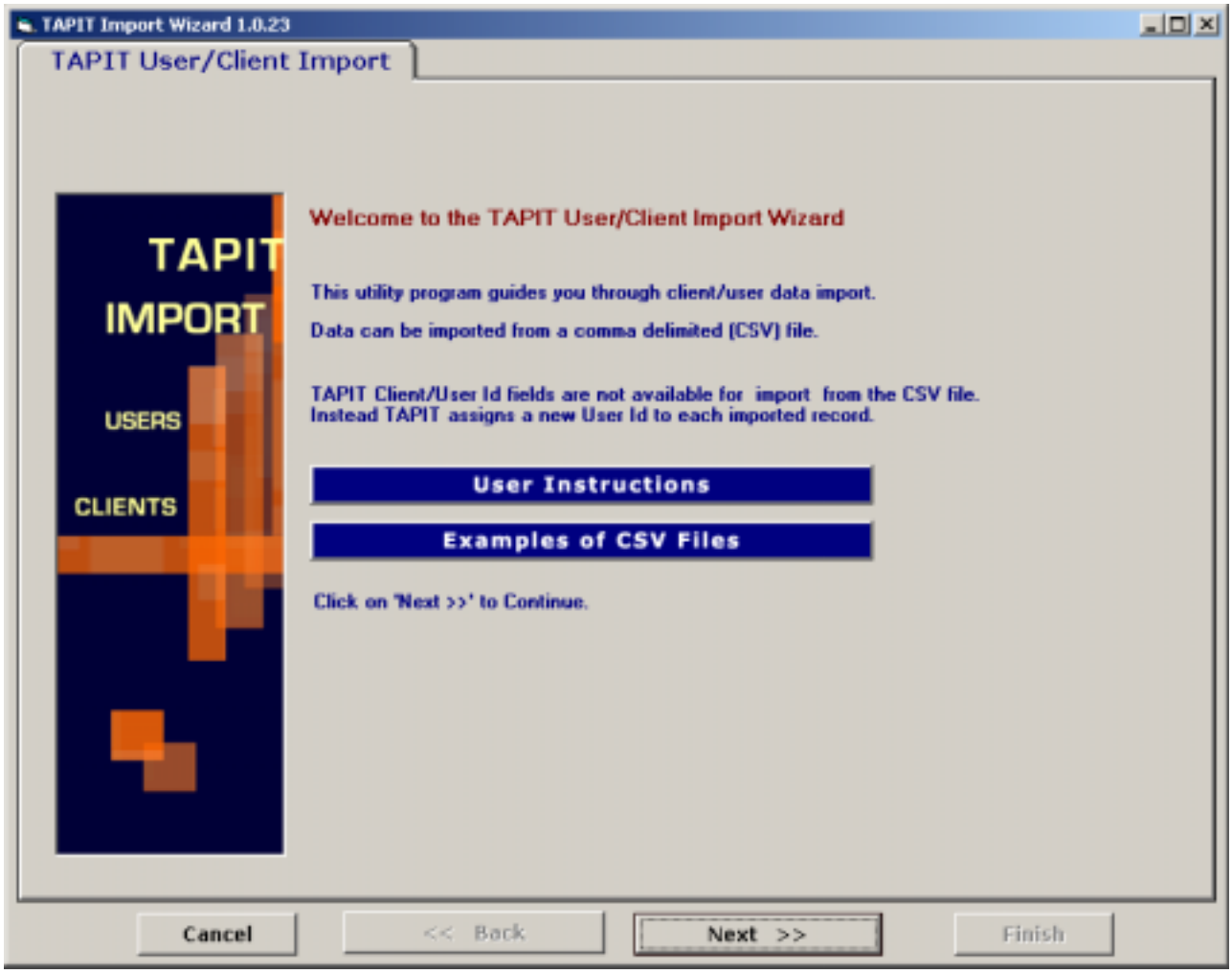
Example of a Department CSV file displayed in MS Excel:



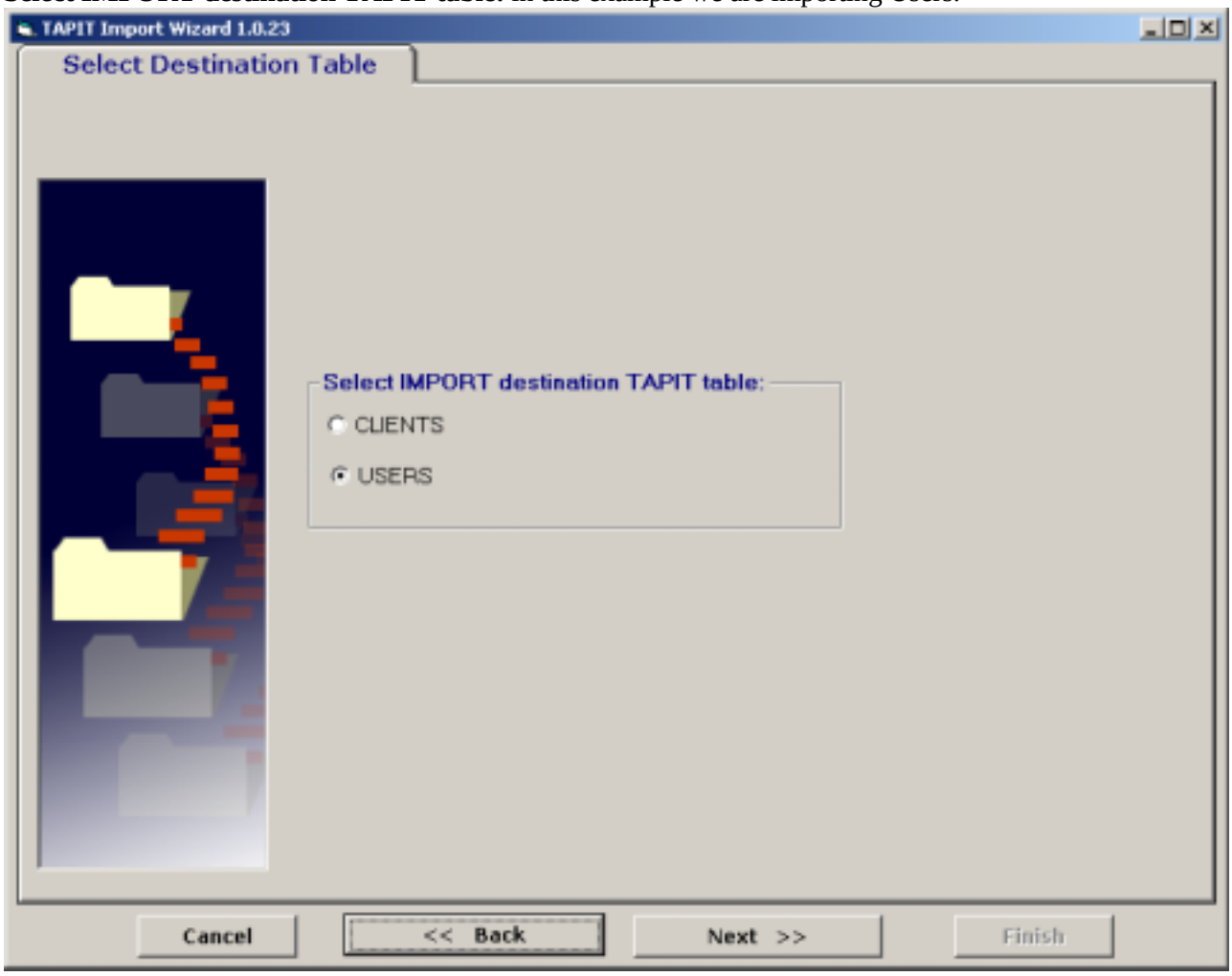
Line 1 – text columns headers –it is not going to be imported to TAPIT.
Line 2 – 6 are all going to be imported, provided none of the Department Names exists in TAPIT.

Using Import Wizard

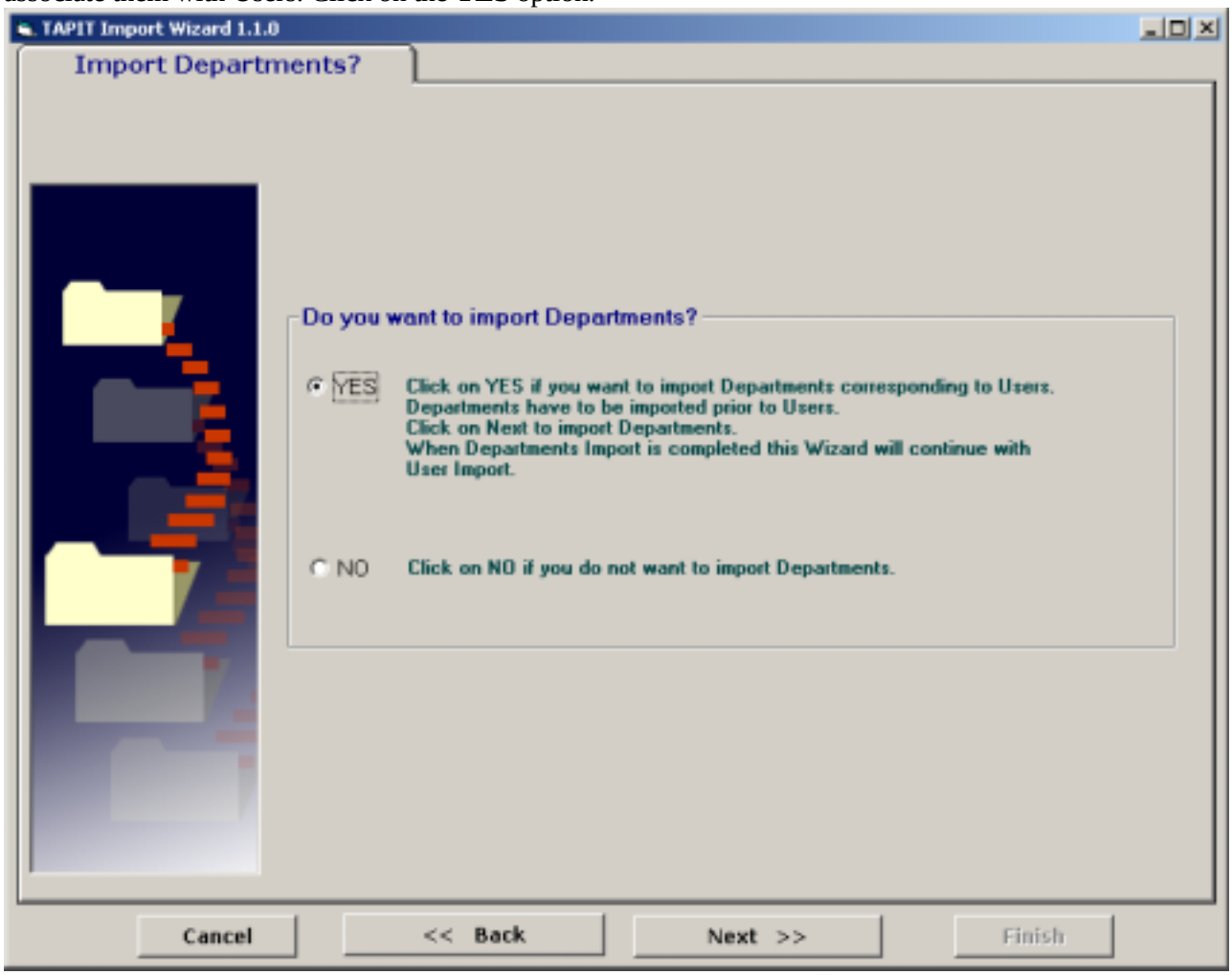
1. Start **TAPIT Import Wizard** by clicking on **START/TAPIT/TAPIT Import**. **TAPIT User/Client Import** screen appears.


TAPIT Import Wizard 1.0.23
TAPIT User/Client Import
TAPIT
IMPORT
USERS
CLIENTS
Welcome to the TAPIT User/Client Import Wizard
This utility program guides you through client/user data import.
Data can be imported from a comma delimited (CSV) file.
TAPIT Client/User Id fields are not available for import from the CSV file.
Instead TAPIT assigns a new User Id to each imported record.
User Instructions
Examples of CSV Files
Click on 'Next >>' to Continue.
Cancel
<< Back
Next >>
Finish

2. Click on **Next**.
   Select Destination Table screen appears.
   Select IMPORT destination TAPIT table: in this example we are importing Users.

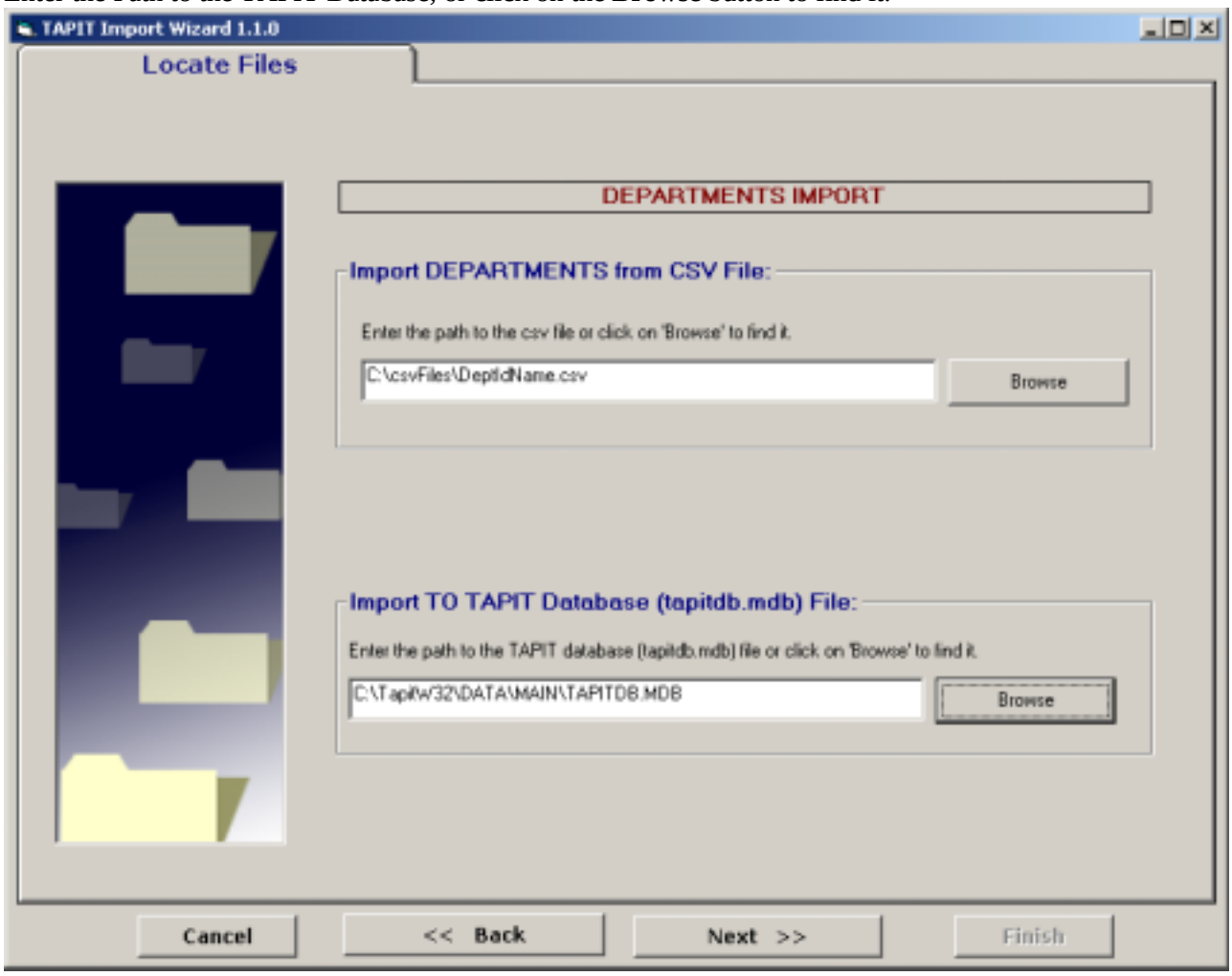


3. The **Import Departments?** screen is displayed. In our case we want to import Departments and associate them with Users. Click on the **YES** option.

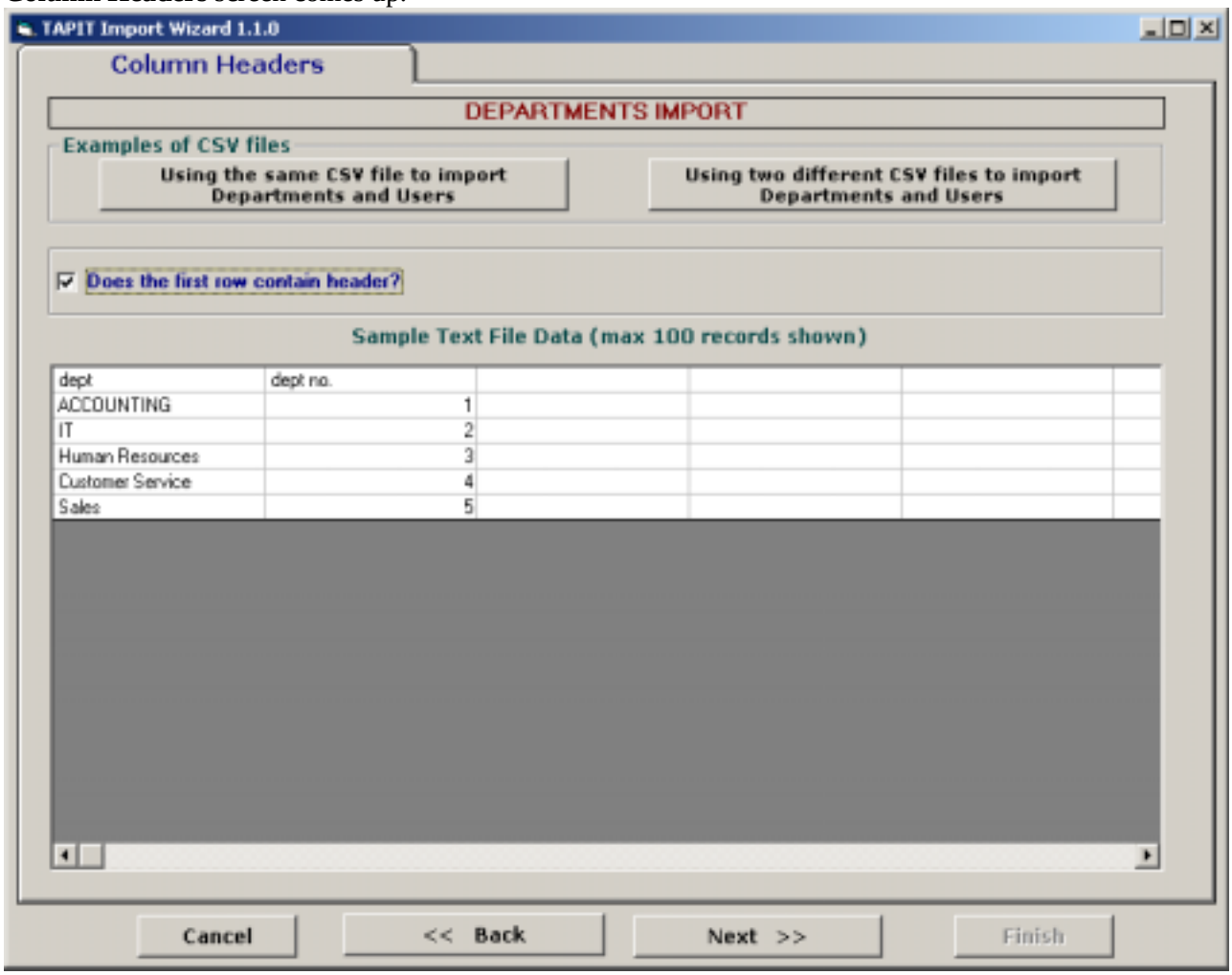


4. Click on **Next**.
   Locate Files screen opens.
   This is the first screen of Departments Import. Departments have to be imported prior to Users. When Departments Import is completed this wizard proceeds with Users import.

   Enter the Path to the Department CSV file, or click on the **Browse** button to find it.
   Enter the Path to the TAPIT Database, or click on the **Browse** button to find it.

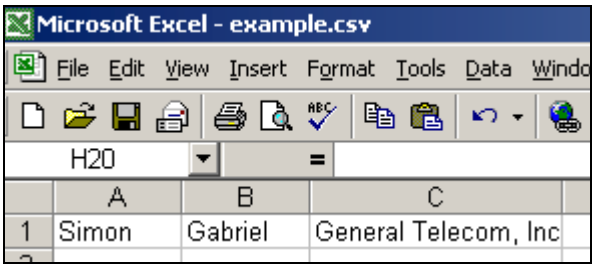


5. Click on **Next**
Column Headers screen comes up.

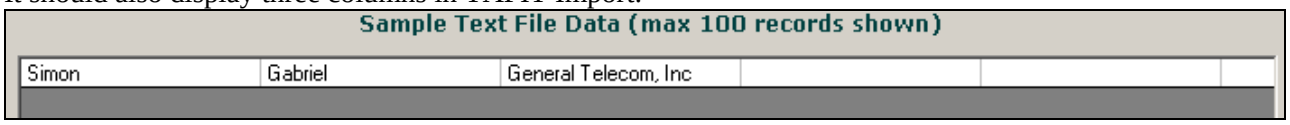


You can view first 100 lines of your Department CSV file for your reference under **Sample Text File Data**.
Please check if the displayed data reflects the Department CSV file (if data is separated into columns properly).
Please note:
Each comma is a beginning of a new column in a Comma Separated text file (CSV).
Columns have to be divided by commas (not any other characters).
If commas are a part of a field value they should be enclosed by double quotes
i.e. *"General Telecom, Inc"*.

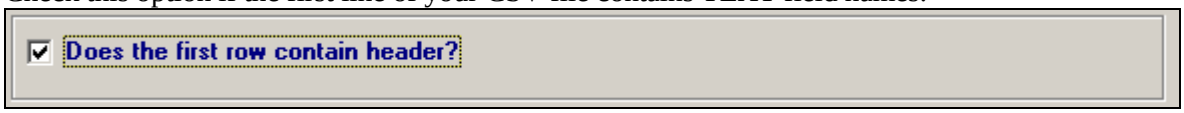
Example:
Our Example.csv file contains following entry:
Simon,Gabriel,"General Telecom, Inc"
This file is displayed in MS Excel in the following format – in three columns.



It should also display three columns in TAPIT Import.

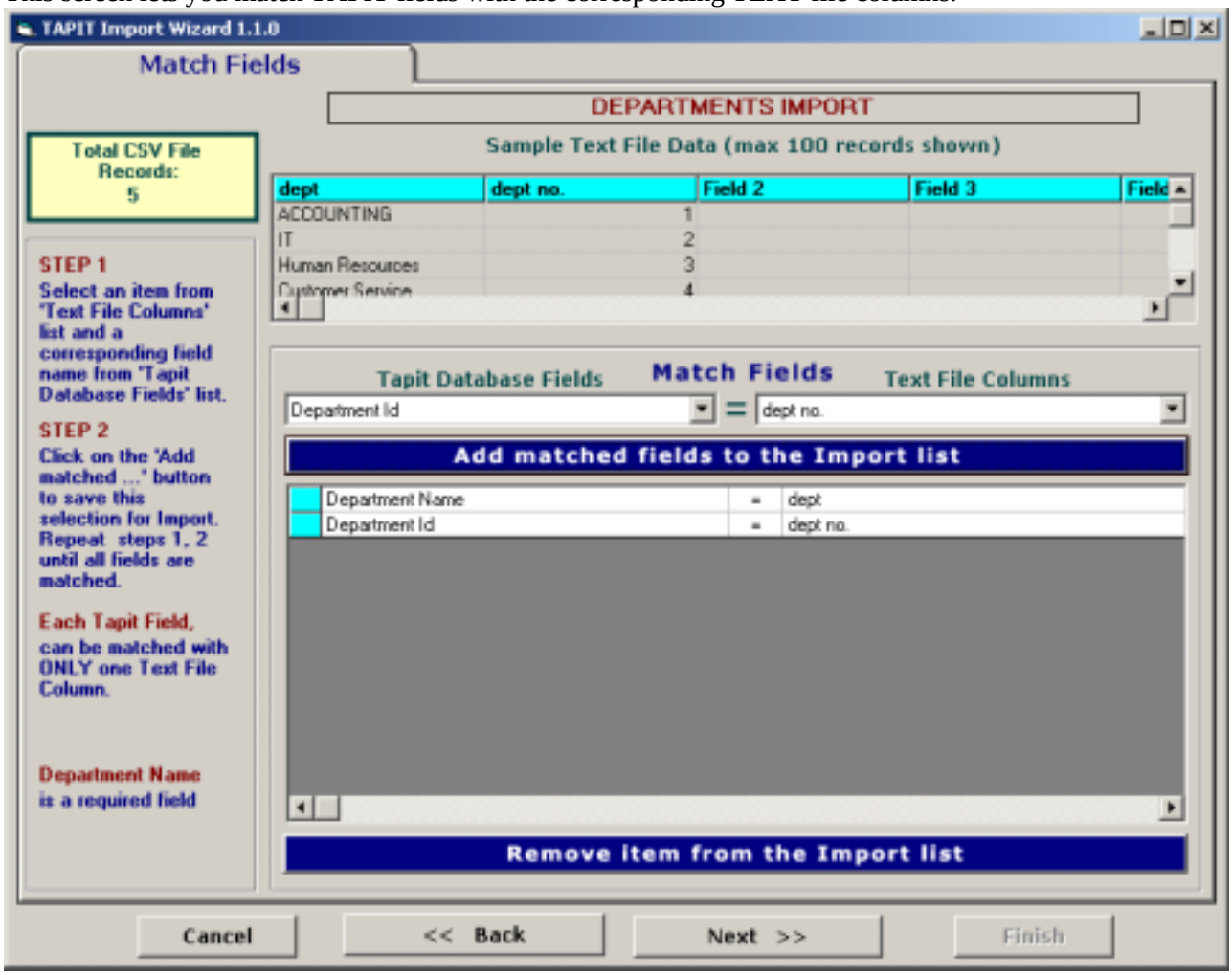


6. **Does the first row contain headers?**
Check this option if the first line of your CSV file contains TEXT field names.



The Department CSV, used in our example, contains headers (see **Format of a Department CSV file** section above, the example of CSV file, line 1). If your CSV file does not have headers it is recommended to create them. Having column names makes it easier to match TAPIT fields with the Text file columns.

7. Click on **Next**.
   The **Match Fields** screen appears.
   This screen lets you match TAPIT fields with the corresponding TEXT file columns.

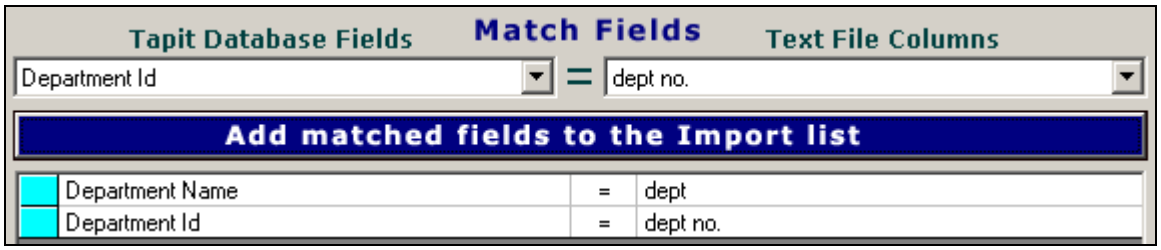


8. Select a TAPIT field from **TAPIT Database Fields** and then a corresponding item from **Text File Columns** list box.

In our case we only need to match Department Name with a corresponding Text File Column.

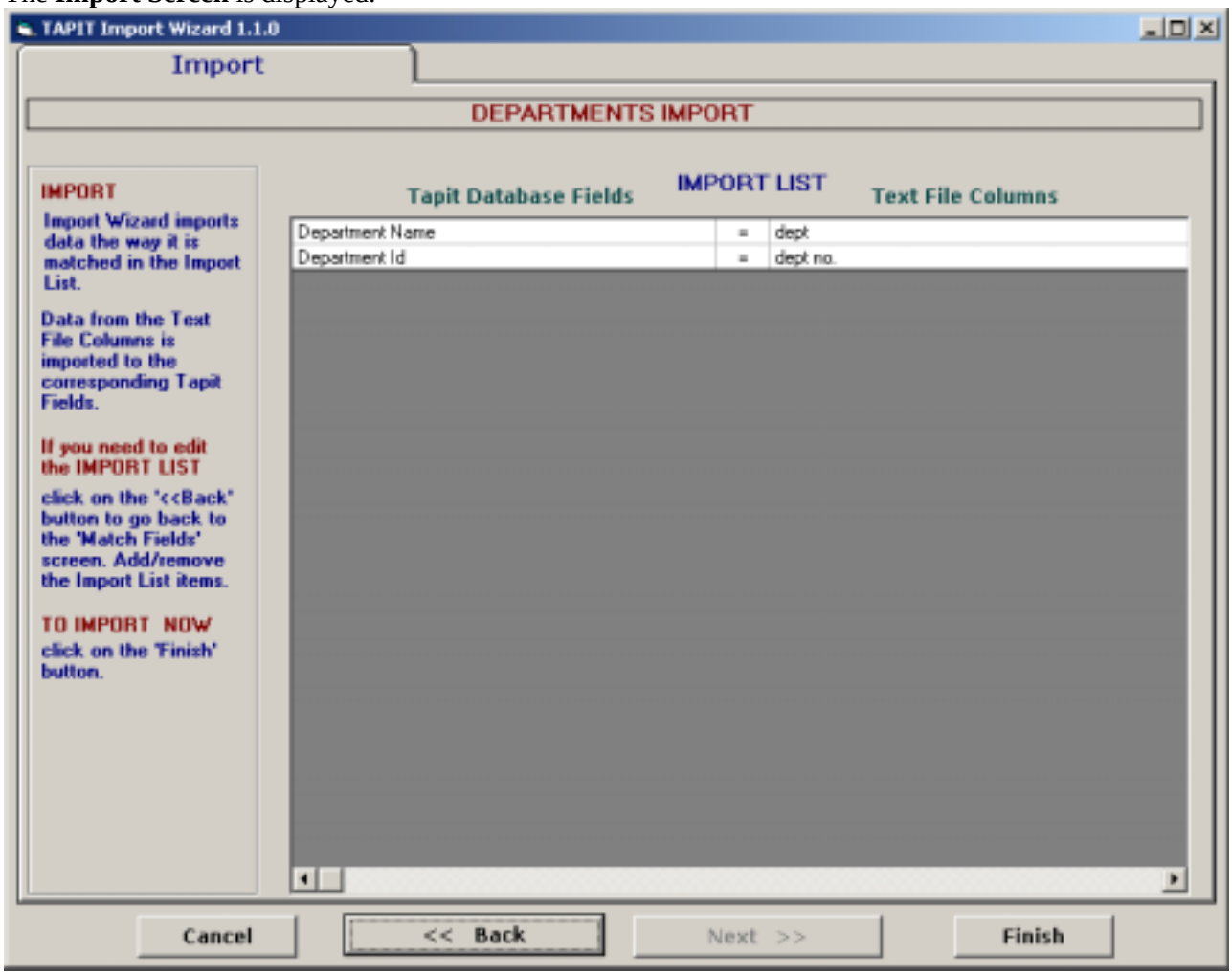
9. Click on **Add matched fields to the Import List**.

   The matched fields appear in the **Import List**.



In our example User csv file contains ONLY Department Ids (Users are associated with Departments via Department Ids) that is why we need to import data to both Department Name and Department Id fields. If you User csv file contains Department Names (Users are associated with Departments via Department Names) then you don't have to import Department Ids.

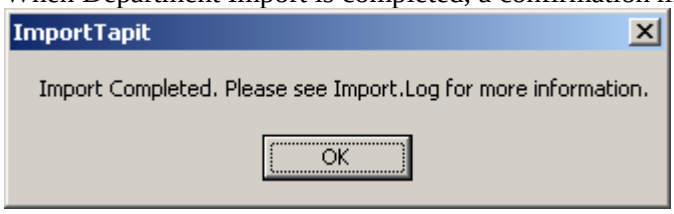
10. When all fields are matched, click on **Next**.
    The **Import Screen** is displayed.



This screen displays the final field selection for import.

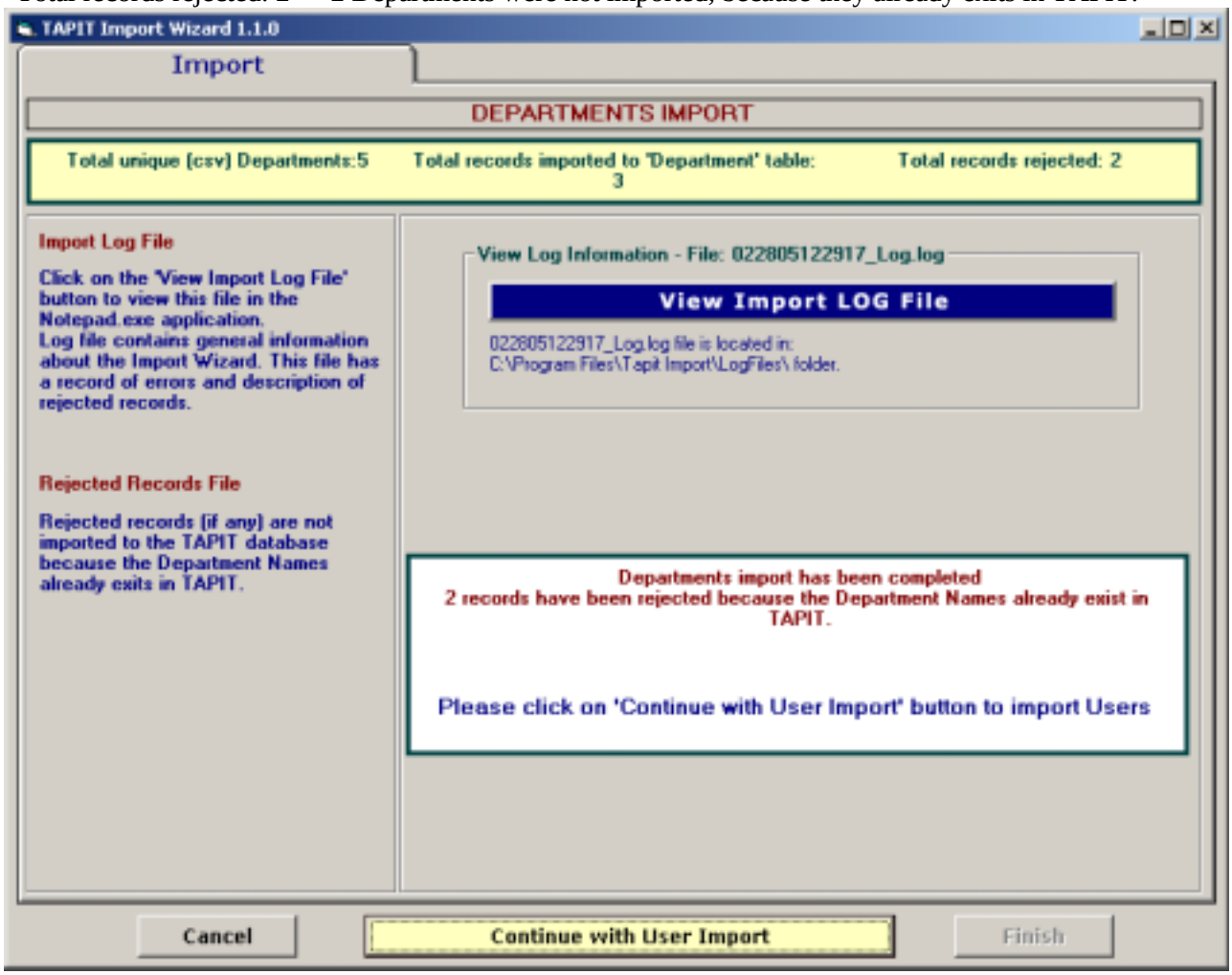
11. Import Wizard imports data the way it is matched in the **Import List**.
    If you need to edit the **Import List**, click on the **Back** button to go back to the **Match Fields** screen. **Add** or **Remove** rows from the **Import List** using the **Add matched fields to Import list** or **Remove item form Import list** buttons.
    Otherwise, click on **Finish** to import.

12. When Department Import is completed, a confirmation message appears.



Click on **OK**.

13. **Your Department Import is completed**.
    Import screen display changes.
    The top of the screen displays statistics.
    Following our example below:
    ”Total unique (csv) Departments: 5” - there has been 5 unique Department Names found.
    ”Total records imported to ‘Department’ table:”3 – 3 Departments were imported
    ”Total records rejected: 2” – 2 Departments were not imported, because they already exits in TAPIT.



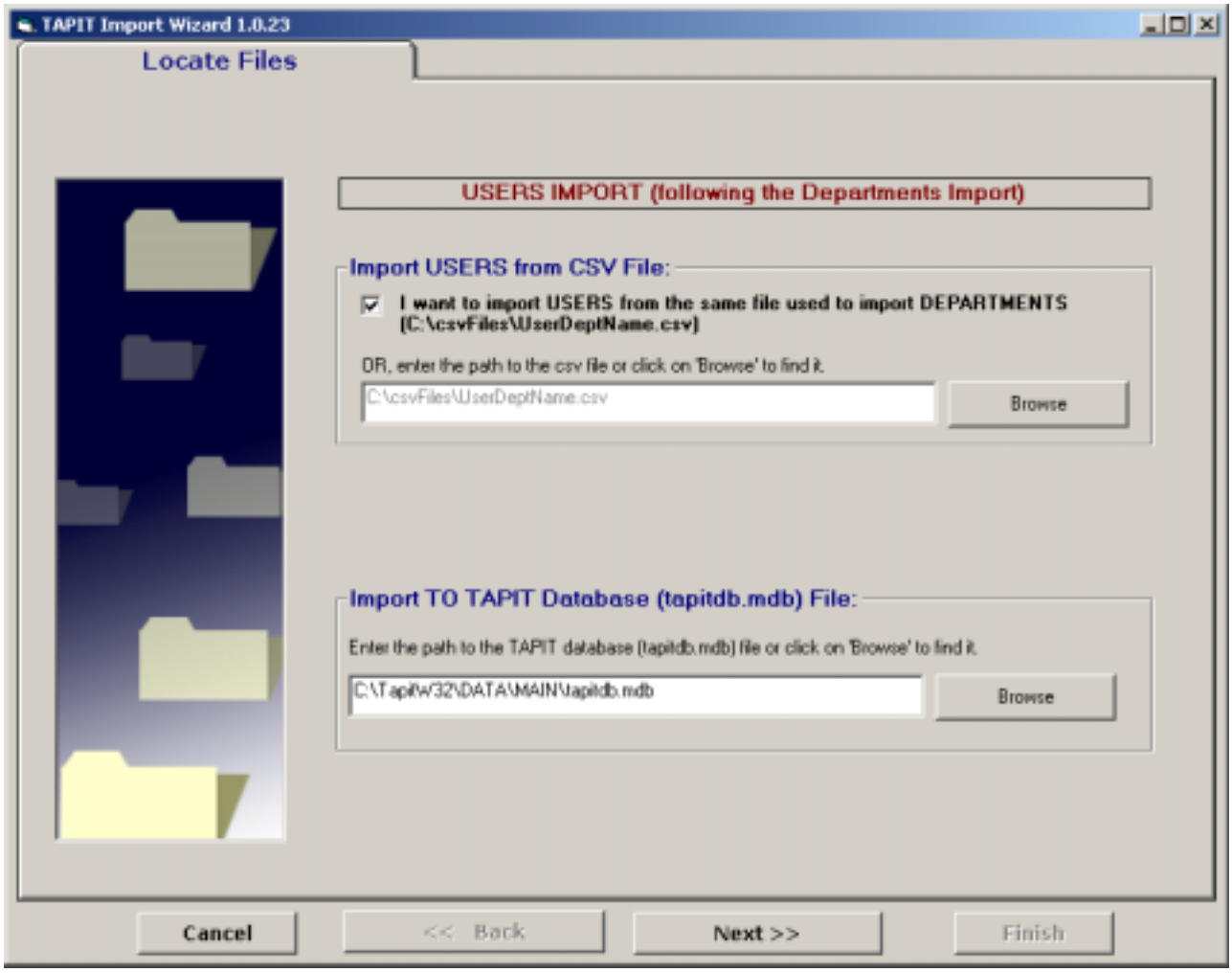
If some **records are rejected** that means they already exist in TAPIT. You don’t need to import them again.
Log file is a text file that contains information on this import. It resides in a subfolder of the folder where TAPIT Import is installed. If default options were accepted when installing TAPIT Import, this file is located in C:\Program Files\TAPIT Import\LogFiles folder. To view log file click on **View Import LOG file**.
The LOG file opens in Notepad.

The log file produced by our example import:

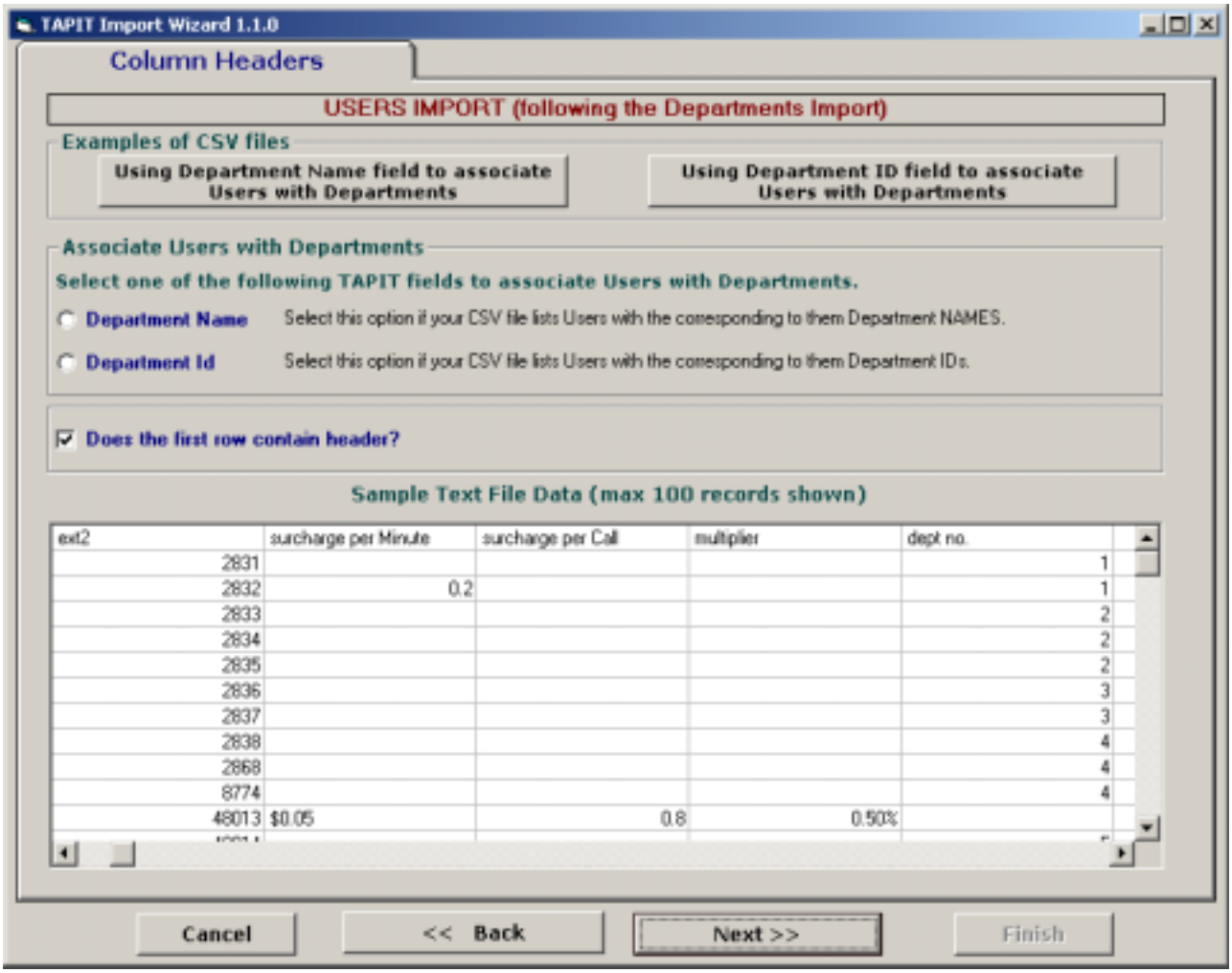
```
==================DEPARTMENTS IMPORT====================

Import FROM CSV file C:\csvFiles\DeptIdName.csv
Import TO the C:\TAPITW32\DATA\MAIN\TAPITDB.MDB database, Department table
**********02/28/05 13:23**********
************************************************************
FIELDS ARE MATCHED THE FOLLOWING WAY:

 Department Name  =  dept  (Field0 DeptName)
 Department Id  =  dept no.  (Field1 DeptId)

************************************************************

***Rejected rec # 1***dept: "ACCOUNTING " already exists in a database and has not been saved in
TAPIT
***Rejected rec # 2***dept: "Customer Service" already exists in a database and has not been saved in
TAPIT
**********02/28/05 13:23**********
Import to the Department table from file C:\csvFiles\DeptIdName.csv is completed
5 total CSV file records.
5 unique Department Names to import.
3 imported records.
2 rejected records.
************************************************************************************
```

14. You can proceed with User Import.
    Click on the **Continue with User Import** button.
    Locate Files screen appears.

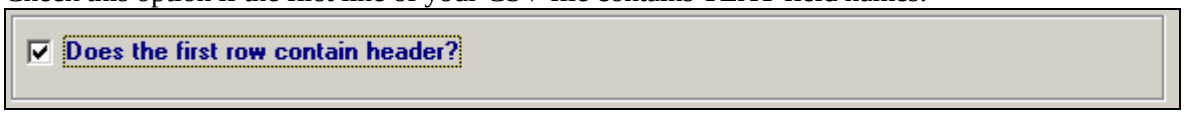
    Enter the Path to the User CSV file, or click on the **Browse** button to find it
    The path to the TAPIT Database is saved from the Department Import and should not be changed.



15. Click on **Next**
    Column Headers screen comes up
    This screen is different from what you have seen when importing Departments.
    Associate Users with Departments part has been added. Since we have imported both Department Names and Department Ids, we need to select one of them to associate Users with Departments. The selection depends on what field is listed in the User csv file. Our file contains Department Ids. We are going to associate Users with Departments via Department Id.

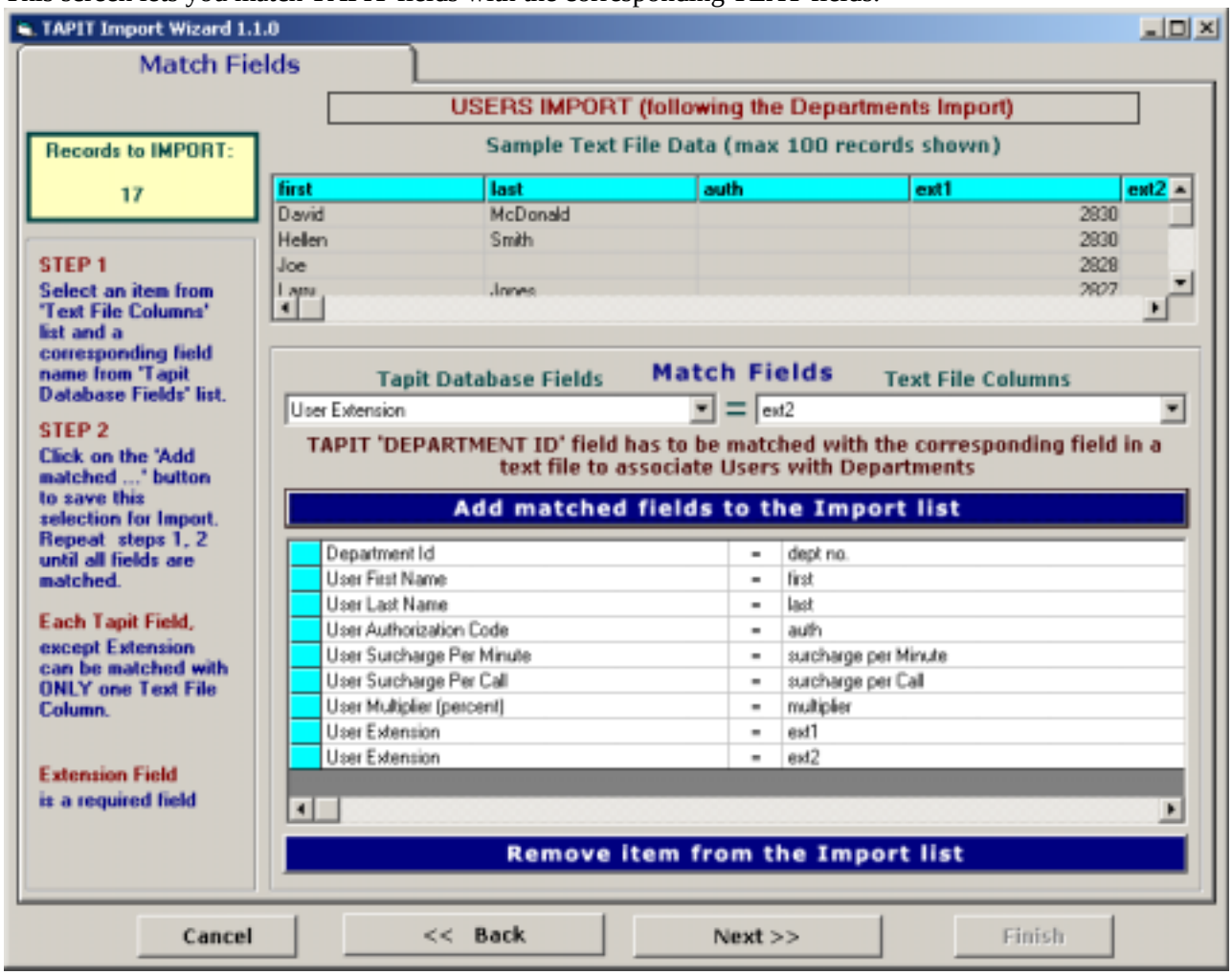


16. **Does the first row contain headers?**
    Check this option if the first line of your CSV file contains TEXT field names.



The Department CSV, used in our example, contains headers (see **Format of a Department CSV file** section above, the example of CSV file, line 1). If your CSV file does not have headers it is recommended to create them. Having column names makes it easier to match TAPIT fields with the Text file columns

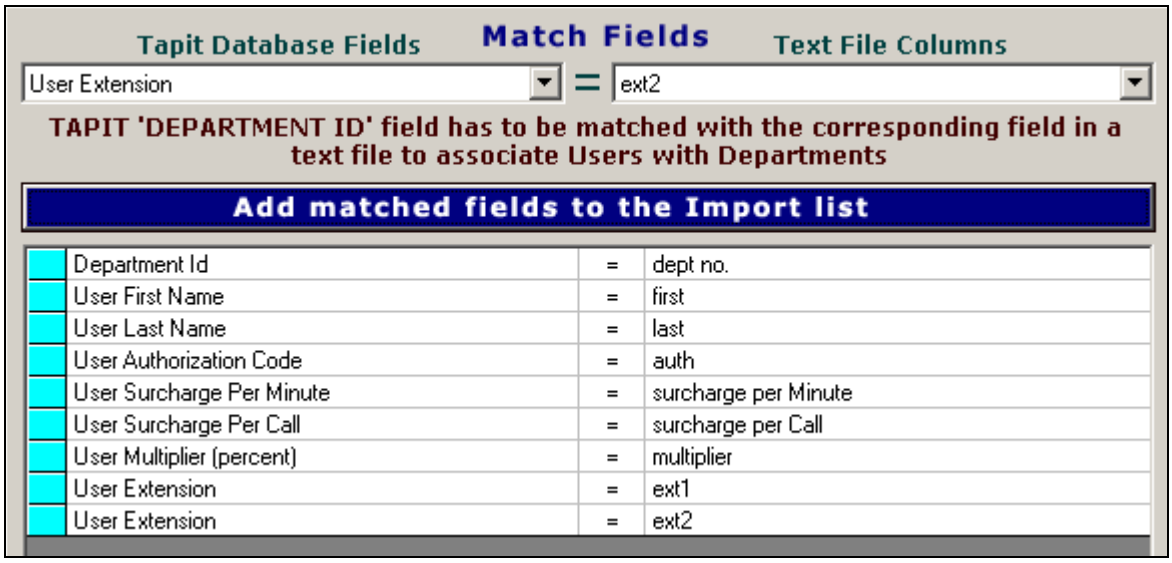
17. Click on **Next**.
    The **Match Fields** screen appears.
    This screen lets you match TAPIT fields with the corresponding TEXT fields.



18. Select a TAPIT field from **TAPIT Database Fields** and then a corresponding item from **Text File Columns** list box.

19. Click on **Add matched fields to the Import List**.

    The matched fields appear on the **Import List**.



WHEN MATCHING USER FIELDS

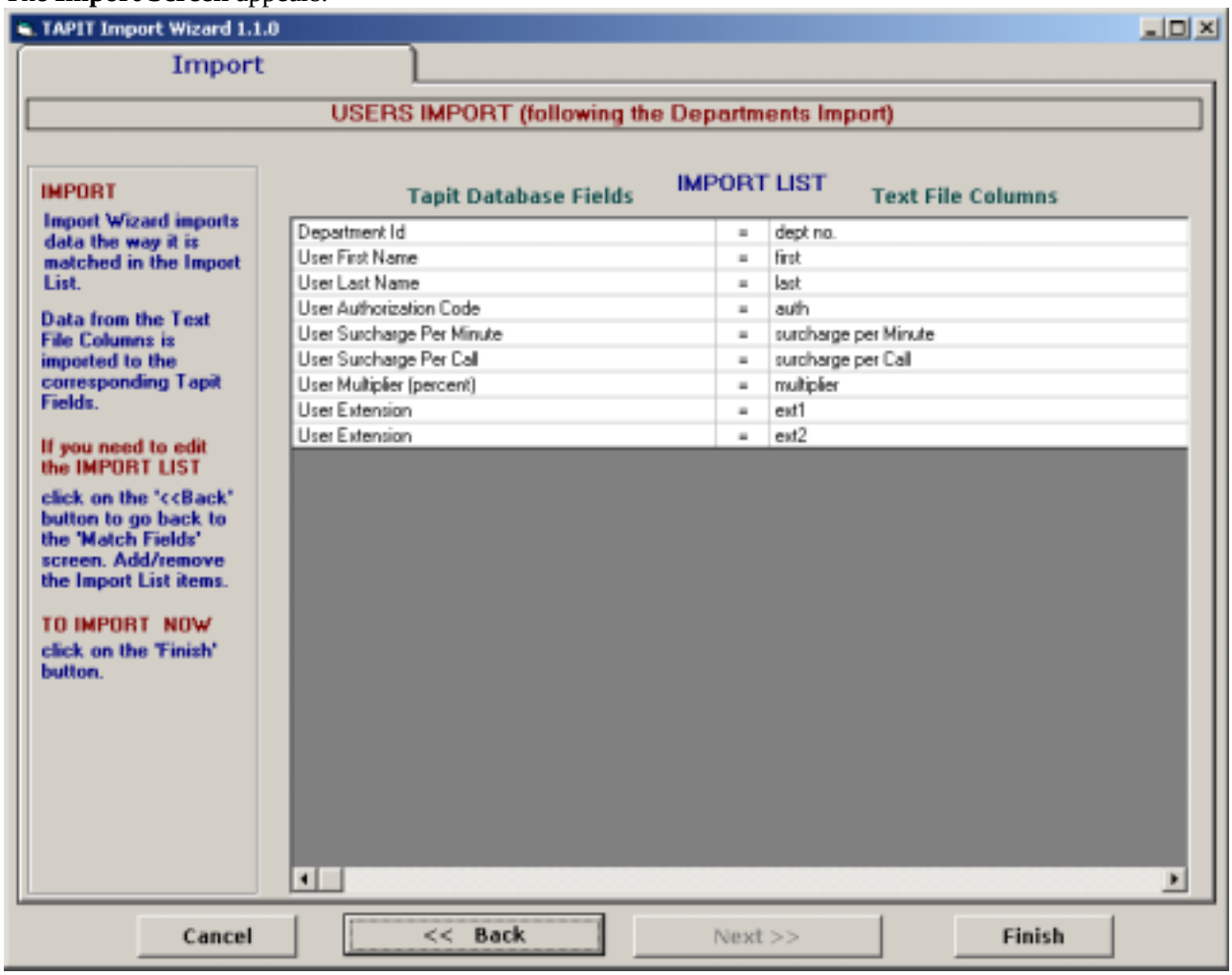
The field associating Users with Departments has to be matched. In our case it is the Department Id field.

User Last Name has to be included in the **Import List**. This TEXT field (column) cannot be empty.

TAPIT **User Extension** is the only field that can be matched with multiple TEXT fields (columns). User can have multiple extensions.

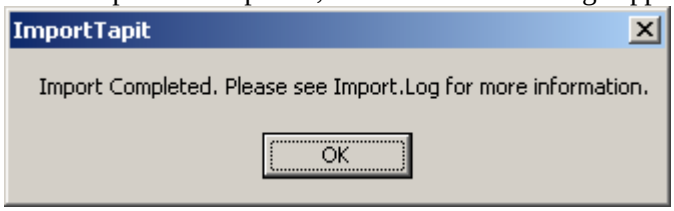
All other TAPIT fields can be matched with only one TEXT field (column).

20. When all fields are matched, click on **Next**.
    The **Import Screen** appears.



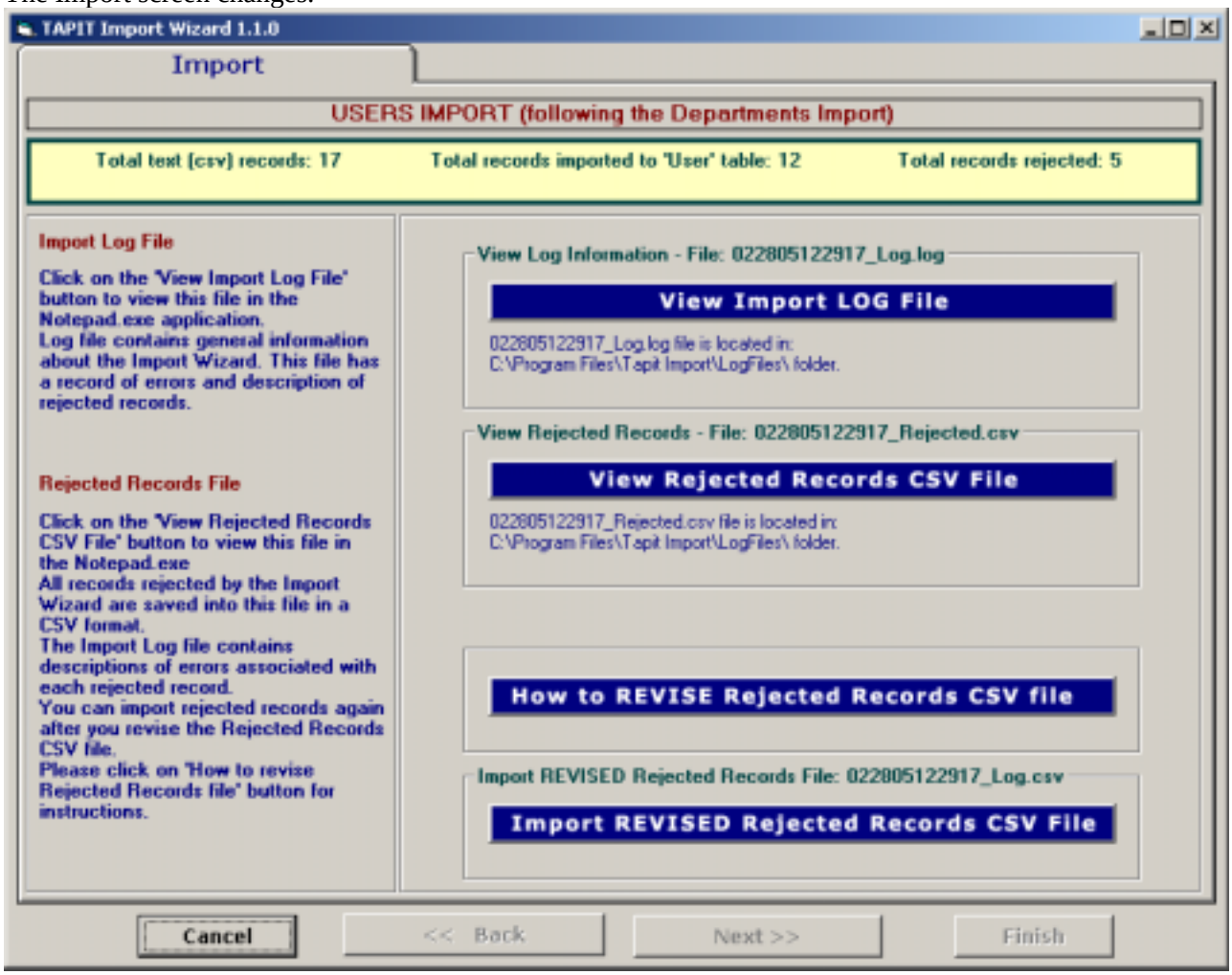
    This screen displays the final field selection for import.
    TAPIT Import Wizard imports data the way it is matched in the **Import List**.
    If you need to edit the **Import List**, click on the **Back** button to go back to the **Match Fields** screen.
    Add or **Remove** rows from the **Import List** using the **Add matched fields to Import list** or **Remove item form Import list** buttons.
    Otherwise, click on **Finish** to import.

21. When import is completed, a confirmation message appears.



    Click on **OK**.

22. The Import screen changes.



Top of the Import screen displays Import statistics.
Following example below – the CSV file contained 17 total TEXT records, 12 TEXT records were successfully saved (imported) into the TAPIT Database. 5 TEXT records were rejected (were not imported).

23. To find out more about rejected records click on the **View Import Log File** button.

The log file contains two parts: the Department part and the Users part.

Scroll down to see the Users Import part.

==========**USERS IMPORT**==========

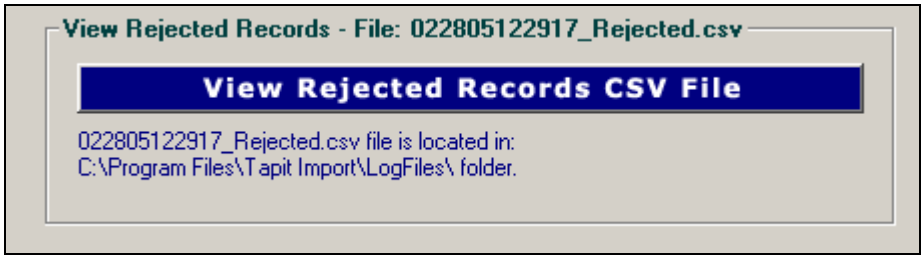
Import FROM CSV file C:\csvFiles\UserDeptId.csv
Import TO the C:\TAPITW32\DATA\MAIN\TAPITDB.MDB database, User table
**********02/28/05 14:45**********
****
FIELDS ARE MATCHED THE FOLLOWING WAY:

Department Id = dept no. (Field8 DeptId)
User First Name = first (Field0 UserFirstName)
User Last Name = last (Field1 UserLastName)
User Authorization Code = auth (Field2 UserAuthCode)
User Surcharge Per Minute = surcharge per Minute (Field5 UserSurchargePerMinute)
User Surcharge Per Call = surcharge per Call (Field6 UserCallSurcharge)
User Multiplier (percent) = multiplier (Field7 UserMultiplier)
User Extension = ext1 (Field3 Extension)
User Extension = ext2 (Field4 Extension)
****

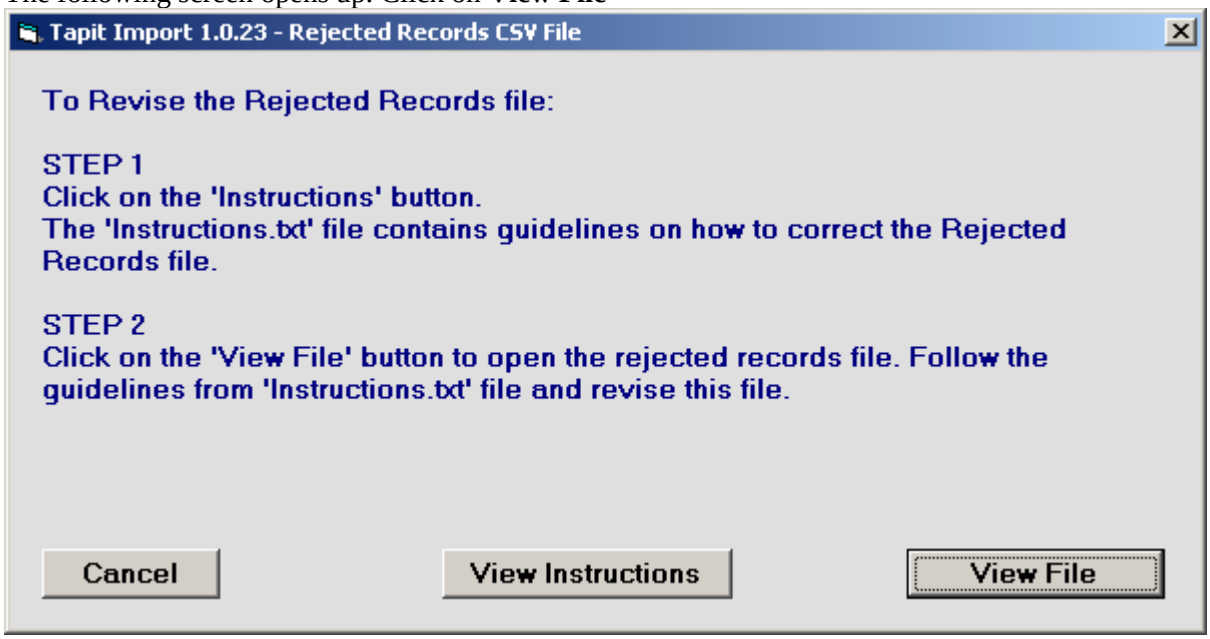
(why records were rejected
rec # matches the record number in a rejected file csv)
Rejected rec # 1Extension: "2830" already exists in a database and has not been saved in TAPIT
Rejected rec # 2last is empty. This a required field in User table and cannot be left empty.
Rejected rec # 3Extension: "A143" contains illegal characters. Only digits are allowed. and has not been saved in TAPIT
Rejected rec # 4auth: "401885" already exists in TAPIT database, User table
Rejected rec # 5auth: "99**#8 " contains illegal characters. It can only contain digits and letters.
**********02/28/05 14:45**********

(Import statistics)
Import to the User table from file C:\csvFiles\UserDeptName.csv is completed
17 total CSV file records.
12 imported records.
5 rejected records.
****

24. To view rejected records click on the **View Rejected Records CSV File** button



25. The following screen opens up. Click on **View File**



The Rejected Records csv file opens in Notepad. The below is the Rejected Records file produced by our example import (how it is displayed in Notepad).
The entries in bold are the entries to be corrected – the log file above has a list of these entries and information on what needs to be corrected.
The first row of our rejected file is the headers. The Rejected Records file headers reflect headers used originally in our CSV import file.

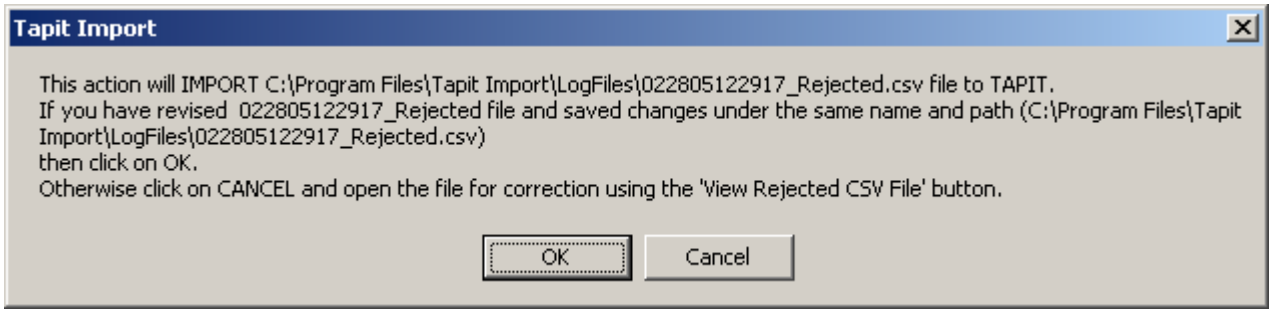
"Rec Number","last","dept no.","first","surcharge per Minute","surcharge per Call","multiplier","auth","ext1","ext2"
"1","Smith","1","Hellen","0.2","","","","**2830**","2832"
"2","","2","Joe","","","","","2828","2833"
"3","Constant","3","Daniel","","","","","**A143**","2836"
"4","Dill","5","Connor","","","","**401885**","","48014"
"5","Chuang","5","Daniel","","","","**99**#8** ","","48017"

The same Rejected Records file after corrections:
"Rec Number","last","dept no.","first","surcharge per Minute","surcharge per Call","multiplier","auth","ext1","ext2"
"1","Smith","1","Hellen","0.2","","","","**2855**","2832"
"2","**Brown**","2","Joe","","","","","2828","2833"
"3","Constant","3","Daniel","","","","","**4143**","2836"
"4","Dill","5","Connor","","","","**401995**","","48014"
"5","Chuang","5","Daniel","","","","**41998**","","48017"

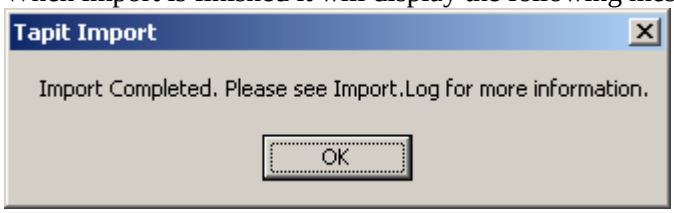
The Rejected Records file needs to be saved in Notepad under the same name.

26. Now you can import rejected records again by clicking on **Import Revised Rejected Records CSV File**.

27. If you have corrected the Rejected Records file and saved under the same name (overwritten) then click on **OK** to continue.

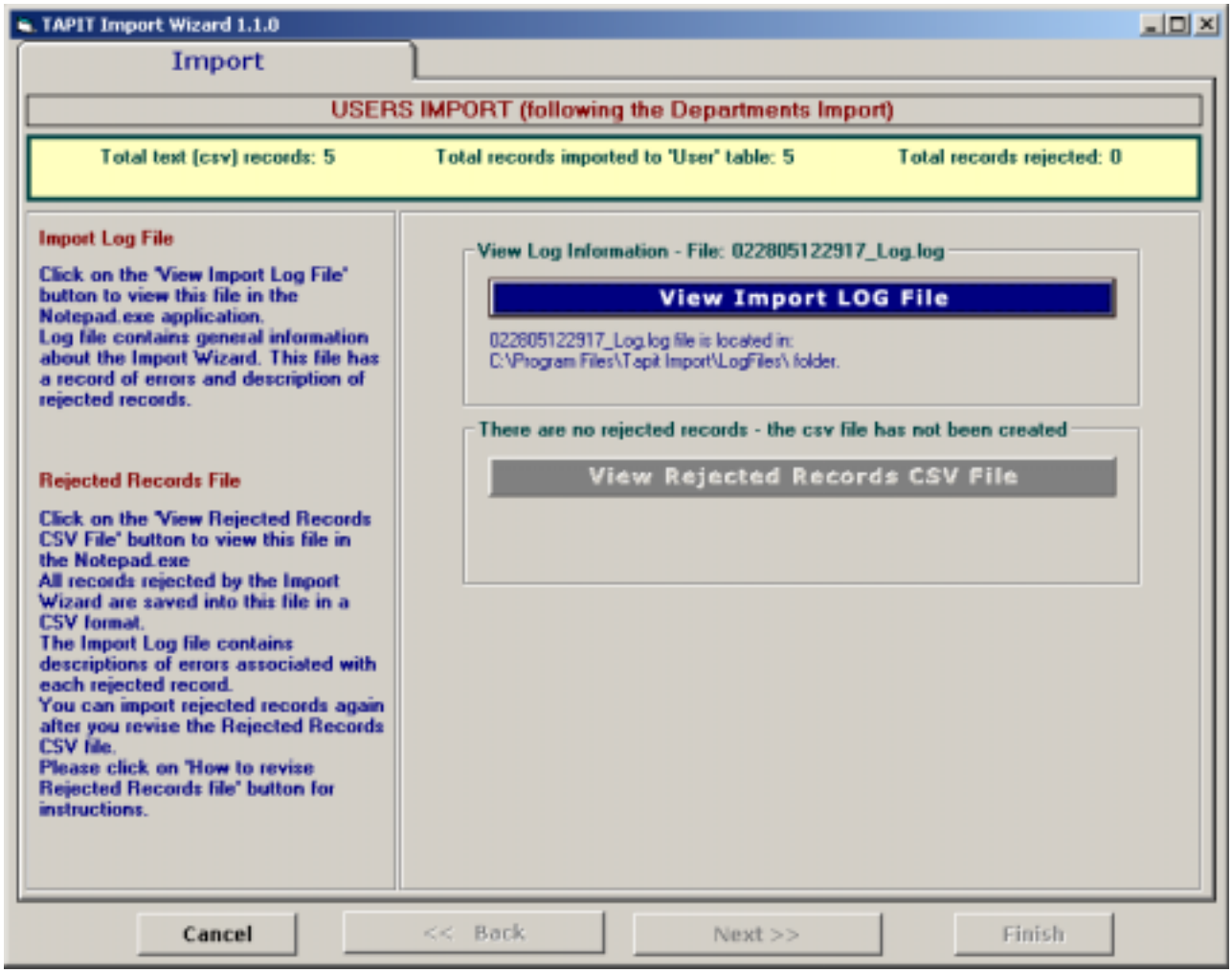


28. TAPIT Import Wizard will import records from the Rejected Records file.
When import is finished it will display the following message:



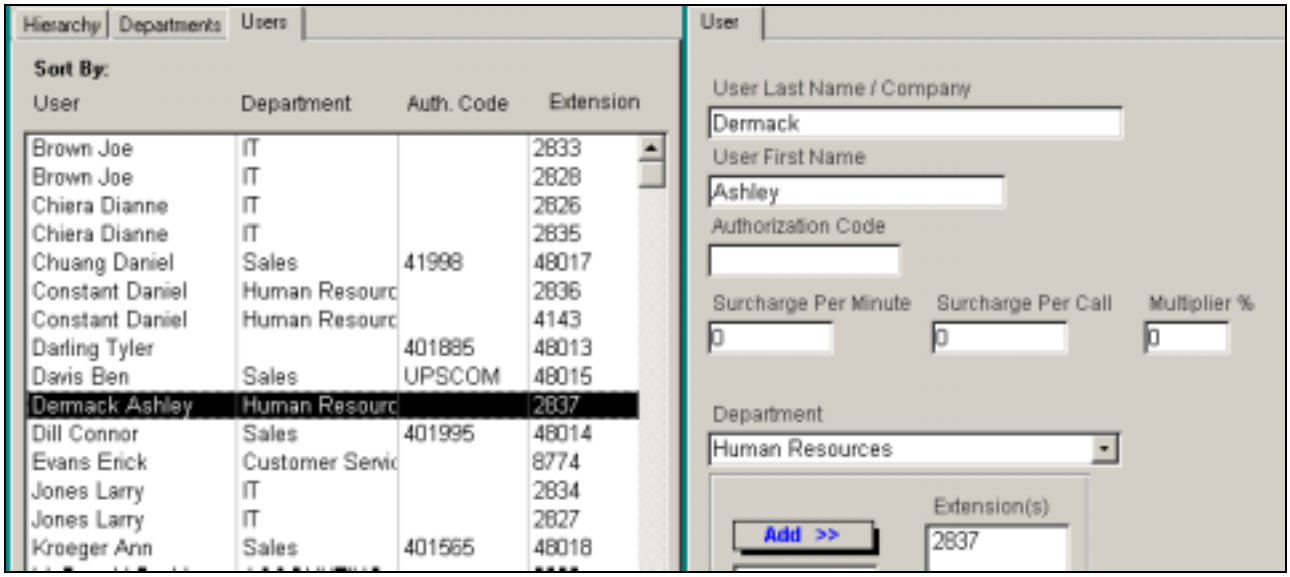
Click on **OK**.

29. The Import screen changes to reflect the new import results (import from Rejected Records csv file).
    In our example:
    ”Total text (csv) records: 5” – total number of text records in the Rejected Records csv file.
    ”Total records imported to ‘User’ table:”5 – the number of text records from the Rejected Records csv file imported to TAPIT.
    ”Total records rejected: 0” – the number of rejected records. This number should be 0 if all of the problems have been corrected in the Rejected Records csv file.



    Your import is completed.
30. You can go to TAPIT and view **Users/Departments** screen.
    NOTE:
    In our example one of the Users records had a typo in the Department Name. Instead of Customer Service it was spelled Customer Service**s**.
    To demonstrate how such error can impact import results we did not correct it.
    As a result we have imported two departments Customer Service and Customer Services instead of one.

Users / Departments
Print
Help
Exit
Hierarchy
Departments
Users
Sort By:
Department
ACCOUNTING
Customer Service
Human Resources
IT
Sales


Hierarchy
Departments
Users
Sort By:
User
Department
Auth. Code
Extension
Brown Joe IT 2833
Brown Joe IT 2828
Chiera Dianne IT 2826
Chiera Dianne IT 2835
Chuang Daniel Sales 41998 48017
Constant Daniel Human Resourc 2836
Constant Daniel Human Resourc 4143
Darling Tyler 401885 48013
Davis Ben Sales UPSCOM 48015
Dermack Ashley Human Resourc 2837
Dill Connor Sales 401995 48014
Evans Erick Customer Servic 8774
Jones Larry IT 2834
Jones Larry IT 2827
Kroeger Ann Sales 401565 48018
User
User Last Name / Company
Dermack
User First Name
Ashley
Authorization Code
Surcharge Per Minute
Surcharge Per Call
Multiplier %
0
0
0
Department
Human Resources
Extension(s)
Add >>
2837